APPENDIX F: ARCHIVES MODULE

ARCHIVES MODULE DATA FIELDS INDEX

QUICK REFERENCE FOR BASIC ARCHIVAL DESCRIPTION IN ICMS VERSION 8.10

The ICMS Archives Module contains a large number of fields in many different screens that museum staff may use when cataloging and describing archival materials. These fields cover virtually any contingency that may be faced in managing archival collections, and give users many options for entering data.

In reality, museum staff usually will need to use only a fraction of these fields. The important thing to remember about the ICMS Archives Module is that it provides complete flexibility; museum staff can use as many or as few fields as they wish.

The archives appendix carefully discusses all fields and features in detail. This Quick Reference provides a step-by-step, shortcut guide to the most commonly used Archives Module fields.

Please see Section P, Overview and Introduction to Archival Cataloging (pp. F:141-146) for an explanation of archival cataloging, and for answers to the following questions:

**** How is archival cataloging different from museum cataloging?***
**** How can I recognize a collection when I see one?***
**** What is an archival hierarchy and can I set one up?***
**** Why is it almost always a mistake to catalog each document individually?***
**** Why is the archives module necessary?***

STEP 1: Make sure the collection you are about to catalog has been arranged.

The catalog record and description of an archival collection generally should reflect the collection's physical arrangement. Therefore, you should never attempt to catalog an archival collection until you have finished arranging it, or at least know what the final arrangement will be like.

STEP 2: Enter the catalog record.

Note: For complete instructions on completing a catalog record for an archival collection, see Chapter 2, Section II.

1. Go to the Cultural Resources directory of the Collections Management Module. Select catalog records. Click the Add New Record button or select Add New Record from the Edit menu.
2. Go to the Registration screen, and complete the following fields:

- **CLASSIFICATION:**
  Class 1 = History
  Class 2 = Communication Artifact
  Class 3 = Documentary Artifact
  Class 4 = Archival/Manuscript Collection
- **OBJECT:** Enter name of collections, in capital letters
- **CATALOG NUMBER**
- **ACCESSION NUMBER** If the collection is made up of multiple collections, enter the principal accession number in this field, and enter additional accession numbers in the Addl

Access # field on the Archives discipline screen (or the Addl Acc# field on the Collection Level screen in the Archives Module.)

- **ITEM COUNT/QUANTITY/STORAGE UNIT:** If you know the exact number of individual documents in the collection, enter that figure into the Item Count field. Otherwise, just indicate the linear footage in the Quantity and Storage Unit fields.
- **DESCRIPTION:** Use mixed-case letters in this field. First, list examples of the types of documents that appear most frequently in the collection (correspondence, reports, maps, blueprints, photographs, newspaper clippings, sound recordings, etc.). Second, provide a one paragraph overview of the collection, citing the sorts of activities that are documented in the collection, and examples of specific topics and highlights.

3. Go to the Archives discipline screen, and complete the following fields:

- **LOCAL COLLECT #:** Enter the collection number for this archival collection.
- **DATES:** Enter the years of earliest and latest documents under Inclusive Dates. If the bulk of material in the collection dates from a narrower time frame, enter these dates under Bulk Dates.
- **HISTORY:** Using mixed-case letters, provide a one or two paragraph history of the organization that created the records, or biography of the person that created the records.
- **ORGANIZATION/ARRANGEMENT:** If the collection is organized into series, select the **ORGANIZATION** subfield. Using mixed case letters, indicate that the collection is broken up into a specific number of series: "Organized into X Series." Then list the series by name, identifying them as "Series I," "Series II," "Series III," "Series IX," etc. If the collection consists simply of individual documents that are arranged in a consistent pattern, then select the **ARRANGEMENT** subfield, and indicate the arrangement scheme ("Alphabetical by Name," "Alphabetical by Subject," "Chronological," "Numerical," etc.).

Note: In order to save the record, you will also have to complete the Controlled Property, Location, Object Status, Status Date, Condition and Cataloger fields. See Chapter 2, Section II.

4. Click **Save** at bottom of screen to save the record. Complete the Tracking information as necessary. Then click the Modify This Record button or select Modify This Record from the Edit menu.
5. At the bottom of the Archives discipline screen, click on **Send to Archives Module**. The data you entered will be copied from the catalog record over to the Collection Level screen of the Archives Module.
6. Click **Save and Close** if you made any modifications to the catalog record, or click **Cancel** if you did not change the catalog record.

STEP 3: Confirm Collection level entry in the Archives Module.

Go to the Archives Module and select the Archives (4-Level) directory. Review fields to confirm that all data was copied successfully from the catalog record in the Collections Management Module.

STEP 4: If the collection is organized into series, complete the appropriate fields in the Series Level screen. (IF THE COLLECTION IS NOT ORGANIZED INTO SERIES, SKIP TO STEP 6).

1. From the Collection Level screen, click on the Series Sub-Records tab, and then click on **Add**.
2. Complete the following fields:

- **<u>SERIES NUMBER</u>:** The series number consists of the collection number, followed by a forward slash, followed by a number representing the series itself. For example, if the collection number is 5001, then the number for the first series in that collection is 5001/001, the number for the second series is 5001/002, etc.
- **<u>SERIES TITLE</u>:** Using capital letters and Roman numerals, indicate "SERIES I," "SERIES II," etc., as appropriate, followed by a colon, and then, also in capital letters, provide the title of the series. NOTE: The reason Roman numerals are used in the title is to make it easier to distinguish series titles in printed finding aids; subseries and sub-subseries, meanwhile, are distinguished by using Arabic numerals and capital letters, respectively (see Step 5, below).
- **<u>DATES</u>:** Enter years of the earliest and latest documents in the series under Inclusive Dates. If the bulk of material in the series dates from a narrower time period, enter these dates under Bulk Dates.
- **<u>EXTENT</u>:** If you know the exact number of individual documents in the series, enter that figure under Count. Otherwise, just indicate the linear footage under Extent and Type of Unit.
- **<u>HISTORY</u>:** ONLY COMPLETE THIS FIELD IF IT WOULD CONTAIN INFORMATION THAT IS SIGNIFICANTLY DIFFERENT FROM INFORMATION IN THE HISTORY FIELD AT THE COLLECTION LEVEL. Ordinarily, the History field at the Collection Level would cover everything in the collection. If the various series in a collection reflect specific organization functions or historical events, requiring more specific information than is provided at the Collection Level, then provide a one or two paragraph summary of that information, using mixed case letters. **Note: If the History field is used, information should be entered into the Expansion Note subfield.**
- **<u>SCOPE</u>:** Using mixed case letters, enter the following information into the Expansion Note subfield: first, list examples of the types of documents that appear most frequently in the series (correspondence, reports, blueprints, photographs, newspaper clippings, sound recordings, etc.); second, provide a one paragraph overview of the series, citing the sorts of activities that are documented in the series and examples of specific topics and highlights.
- **<u>ORGN/ARRGN</u>:** If the series is organized into subseries, select the **<u>ORGANIZATION</u>** subfield; using mixed case letters, indicate that the collection is broken up into a specific number of subseries: "Organized into X Subseries." Then list the subseries by name, identifying them as "Subseries A," Subseries B," "Subseries C," etc. If the series consists simply of individual documents that are arranged in a consistent pattern, select the **<u>ARRANGEMENT</u>** subfield, and indicate the arrangement scheme: "Alphabetical by Name," "Alphabetical by Subject," "Chronological," "Numerical," etc.

3. Click **<u>Save and Close</u>** before proceeding.

<u>STEP 5</u>: If the series is organized into subseries, complete the appropriate fields in the Subseries Level screen. (IF THE SERIES IS NOT ORGANIZED INTO SUBSERIES, SKIP TO STEP 6).

1. From the Series Sub-Records tab, click **<u>Add</u>**.
2. Follow the same procedures as outlined above for describing series, with the following variations:

- **<u>SUBSERIES NUMBER</u>:** The subseries number consists of the series number, followed by a period, followed by a number representing the subseries itself. For example, if the series number is 5001/001, then the number for the first subseries in that series would be 5001/001.001, the number for the second subseries would be 5001/001.002, and so forth.

- **SUBSERIES TITLE:** Using capital letters, indicate "SUBSERIES A," "SUBSERIES B," "SUBSERIES C," etc., as appropriate, followed by a colon, and then, also in capital letters, provide the title of the subseries.

3. NOTE: In certain rare instances, some subseries may be divided into sub-subseries, and some sub-subseries may be divided into sub-sub-subseries. In such cases, just follow the same procedures as outlined above for subseries, with the following variations:

   - **NUMBERS:** For a sub-subseries, add a period to the subseries number, and then add a number for the sub-subseries. For example, if the subseries number is 5001/001.002, then the first sub-subseries within that subseries would be 5001/001.002.001. If sub-subseries 5001/001.002.001 is divided into sub-sub-subseries, then you would add another period and another number for each sub-sub-subseries.
   - **TITLES:** Whereas a series title is identified with a Roman numeral (SERIES I, etc.), and a subseries title is identified with a capital letter (SUBSERIES A), a sub-subseries title is identified by an Arabic numeral (SUB-SUBSERIES 1), and a sub-sub-subseries title is identified by a lower case letter (SUB-SUB-SUBSERIES a).

4. Click **Save and Close** before proceeding.

STEP 6: If you choose to enter file unit descriptions, complete the appropriate fields in the File Unit Level screen. (IF YOU PREFER THE ALTERNATIVE OF SIMPLY PREPARING A LIST OF FILE TITLES, SKIP TO STEP 8).

1. From the Series or Subseries Level screen (as appropriate), click on the File-Unit Sub-Records tab, and then click **Add**.
2. NOTE: A "file unit" refers to a group of documents that are filed together – NOT to an individual file folder. A file unit may be contained within a single folder, or it may cover dozens of folders – it is still just one file unit. For example, the personnel file on an employee who works for a company for 1 year would likely be contained within a single folder. The personnel file on an employee who worked for a company for 20 years, however, would likely have become so voluminous that it takes up 10 folders – but those 10 folders should still be regarded as just one file unit, and should have only one file unit entry in the Archives Module.
3. In the **CATEGORY** field, you can select the type of records that are contained in the file unit, including ordinary textual (paper) records, architectural records, photographs, maps, moving images, etc. **For the sake of practicality, it is permissible simply to go with the default screen and ignore this field.**
4. Complete the following fields:

   - **FILE UNIT NUMBER:** Enter a single number for the entire file unit (regardless of how many folders it might encompass). If there are 10 file units in the series or subseries, then they should be numbered from 1 to 10. Start over again with number 1 when you number the file units in the next series. The **COLLECTION NUMBER** and **SERIES** or **SUBSERIES NUMBER** fields should fill in automatically.
   - **CATALOG NUMBER and ACCESSION NUMBER:** Add these numbers manually.
   - **DATES**: Indicate years of earliest and latest documents in the file unit. If all documents are from the same year, just cite that year.
   - **TITLE:** Provide the title of the file unit. Don't repeat the names of the collection and the series, even if they are printed on the file folder.
   - **SUMMARY NOTE:** Provide a one or two sentence overview of the file unit's contents – both the types of documents it contains, and the principal subjects it covers. Use mixed-case letters.

5. Click **Save and Close** before proceeding.

STEP 7: If you choose to enter item level descriptions, complete the appropriate fields in the Item screen. THIS OPTION IS NOT RECOMMENDED IN MOST CASES. (IF YOU CHOOSE NOT TO ENTER ITEM LEVEL DESCRIPTIONS, SKIP TO STEP 8).

1. From the File Unit screen, click on the Item Sub-Records tab, and then click **Add**.
2. NOTE: An "item" is an individual document, irrespective of the number of pages. A one-page letter is a single item; similarly, a fifty-page report is a single item. You should complete only one Item screen per document.
3. As with the File Unit screen, the Item screen includes a **CATEGORY** field that enables you to select the type of document (textual record, map, photograph, etc.). **For the sake of practicality, it is permissible simply to go with the default screen and ignore this field.**
4. Complete the following fields:

- **ITEM NUMBER:** Enter a number for the specific document being described. If there are 10 items (or documents) in a file unit, they should be numbered from 1 to 10. Start over again with number 1 when you start numbering items in the next file unit. The **COLLECTION NUMBER** and **SERIES** or **SUBSERIES NUMBER** and **FILE UNIT NUMBER** fields should fill in automatically.
- **CATALOG NUMBER and ACCESSION NUMBER:** Add these numbers manually.
- **DATES:** List the year the document was produced, if one is provided. Otherwise, put "n.d."
- **TITLE:** Provide the title of the document, if it has one; otherwise, provide an appropriate citation (for example, a letter from Franklin Roosevelt to Harry Truman, dated October 3, 1944, would be cited as "ROOSEVELT TO TRUMAN, 10/3/1944;" and undated letter from Dwight Eisenhower to Richard Nixon would be cited as "EISENHOWER TO NIXON, n.d."). Use all caps.
- **SUMMARY NOTE:** Indicate the type of document (report, letter, photograph, map, etc.), and provide very brief summary of its substance. Use mixed-case letters.

5. Click **Save and Close** before proceeding.

STEP 8: If you choose to do so, compile a Container List or Folder Title list, as an alternative to full File Unit entries. (IF YOU CHOOSE NOT TO DEVELOP A CONTAINER LIST OR FOLDER TITLE LIST, SKIP TO STEP 9).

1. From the Collection Level screen in which you have already entered information for this particular collection, click on the Supplemental Information tab; then select Container List, and click **Add**.
2. When the Container List screen appears, press F12 or click the formatted memo icon at the end of the Folder field. This will bring up a formatted memo field. Complete as follows:

- **NUMBER:** Indicate the box number for which you will be listing files ("Box 1," "Box 2," etc.). Number your boxes consecutively from the beginning of the collection through the end of the collection.
- **TITLE:** You may choose between listing the titles of every file unit in the box, or simply listing the titles of the first and last file units in the box.

3. Click on **Save and Close** before proceeding.

4. Repeat this process for each box in the collection.

<u>STEP 9</u>: If you choose to do so, print a hard copy finding aid directly from your entries in the Archives Module.

1. From the Collection screen, go to the menu bar at the top and select Record. Then select Finding Aid/SGML from the bottom of the menu.
2. Select the type of finding aid you want from the Template field (click **<u>Browse</u>**, and select "FINDING_AID.RTFT" if you do not want to include full file unit descriptions or if you want to include container lists. Select "FINDING_AID_FILEUNIT.RTFT" if you do want to include full file unit descriptions. Select "FINDING_AID_ALL_LEVELS.RTFT" if you want to include records from all four levels.
3. The finding aid will be saved as a Word document, so indicate in the Output field where you want to save the document. You can click **<u>Browse</u>** to select a location to save the finding aid.
4. Open the document in Word, and print.

APPENDIX F: ARCHIVES MODULE

A. Overview

1. *What is the Archives Module?*

The Archives Module is an **ICMS** feature that you can use to describe and manage archival collections. There are two types of directories available in the Archives Module: Hierarchically Organized Archives and Item Level Only Archives. Also included are data screens and functions to help you define restrictions and record biographical data about the creators of your collections.

2. *How is the Hierarchical Archives Directory used?*

Use the Hierarchical Archives directory (also called Four Level Archives) to catalog and manage hierarchically organized archive or manuscript collections. Hierarchically organized collections are first described at the broadest level--the Collection level. The contents of that collection may be divided and organized into sub-divisions. The three basic sub-levels are Series, File Unit, and Item. However, a collection can be arranged into more than just four levels by further dividing Collection and Series levels into subcollection, sub-subcollection, subseries, sub-subseries, etc.

It is not necessary to enter records at every level. For example, a Series may only have Item records without any intermediate File Unit records. The organization is fluid and depends on the nature of the collection.

In **ICMS**, each level in the archive hierarchy is maintained as a distinct data table. Related records in those tables are linked by the numbering system, which preserves the relationship of the hierarchy. Data for each level is stored and accessed separately.

See Section P of this appendix for an overview and introduction to organizing and cataloging archival collections.

3. *How is the Item Level Archives Directory used?*

Use an Item Level Archives Directory to catalog archival material at the Item Level only without related Collections, Series, and File Unit records. Use of the Item Level directory is strongly discouraged. It was included in **ICMS** to cover those extremely rare exceptions when item level-only description is necessary. If you want to manage archival collections properly, usefully, and efficiently, you should use the Hierarchically Organized Archives directory.

4. *Do I have to use the Archives Module to catalog archival collections?*

Use of the archives module is mandatory for NPS, and may be optional or mandatory for other bureaus depending on bureau policies. However, all archival records that are part of your museum collection must be cataloged in a Cultural Resources directory using the Archives discipline also. See Section II of Chapter 2 for information on cataloging archival records.

Archives records cataloged in the Archives Module only are not included in your CMR, AIP or National Catalog Submission. You must enter a Cultural Resources record for your archives for them to be included in your annual reporting.

5. *What types of materials do I catalog as archival collections?*

Catalog the following types of documentary materials as archival/manuscript collections:

- personal papers (such as a family's letters and photographs)
- organizational records (such as corporate records)

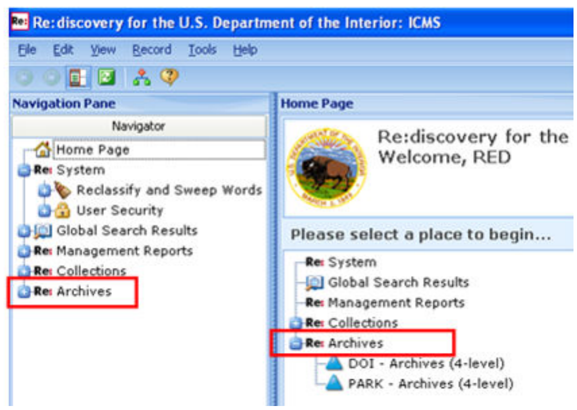
- assembled manuscript collections (such as an assembled collection of Civil War maps and correspondence)
- resource management records (such as field notes and reports)

Refer to the DOI *Museum Property Handbook,* Part II (*MPH-II)*, Appendix C: Historical and/or Scientific Document Collections or the NPS *Museum Handbook*, Part II (*MH-II*), Appendix D: Museum Archives and Manuscript Collections, for additional descriptions of these types of materials.

6. *How do I access the Archives Module?*

To access the Archives Module:

- From the Home page, double click on the Re: Archives node, *or*
- In the Navigation Pane, single click on the Re: Archives node.



You will see the available directories listed.

Note: If you do not have an archives directories defined, you can create new directories by using the Create New Directory option on the Tools menu. See Section IV of Chapter 9 for information on creating directories.

7. *What associated modules are available in the Archives module directories?*

There are three associated modules available in each type of archives directories:

- Restrictions
- Artist/Maker/Eminent Figure
- Names and Addresses

For further information on these associated modules, see Chapter 4.

B. Hierarchical Archives

1. *How is the Hierarchical Archives organized?*

The Four-Level Archives directory has four hierarchically related levels: Collection, Series, File Unit and Item. A collection may contain several series. Each series may contain multiple file units. And each file unit may contain many items.

For a definition of each level of the four-level archives and how they are used, see Section P, Overview and Introduction to Archival Cataloging.

2. *Must I use every level to catalog an archives collection?*

No. It is not necessary to enter records at every level. For example, a Series may only have Item records without any intermediate File Unit records.

3. *How are the four levels connected?*

The hierarchical relationships between levels are created and maintained through the numbering. All Series, File Unit, and Item records within a Collection share the same Collection Number. All File Units within a particular share the same Collection Number and Series Number. For more information on creating numbers correctly, see Section C, Archives Numbering below.

4. *How many screens does an archives level record have?*

There are two main elements to an individual archival catalog record: Level information and related records.

The "Level" tab is labeled according to the archival level you are viewing (e.g. Collection Information, Series Information, File Unit Information, and Item Information) and is divided into three additional tabs:

- The main catalog record tab: Collection, Series, File Unit, or Item Information

- Extended Information

- MARC Information (Collection Level only -- optional)

Together the Level Information sub-tab and the Extended Information tab contain the main descriptive content of the Collection, Series, File Unit, or Item record. In addition, the MARC Information tab gives you the option to view and edit the MARC record that can be created from the collection level record.

Note: A MARC (**MA**chine-**R**eadable **C**ataloging) record is a standard digital catalog record used by library systems. For further information about MARC records see Section M below. MARC Information is optional.

5. *What is the Images tab?*

You can attach images to document and identify your records using the Images tab. See Appendix G, Imaging & Multimedia, for more information.

6. *Where can I access Multimedia?*

The archives module does not have a separate tab for Multimedia but you can still associate multimedia files by selecting Multimedia on the View menu.

7. *What is the Hierarchical Parents tab?*

The Hierarchical Parents tab shows the records that are related to the current record at the levels above. For example, from an Item level record, to view the Series and/or Collection records that the Item belongs to, go to the Hierarchical Parents page. Click on one of the parent links to go to that record. Collection level records have no Hierarchical Parents unless it is a subcollection or sub-subcollection. See Section I, Hierarchical Archives Navigation below for more information.

8. *What are the Sub-Records tabs?*

The tabs for Series, File Unit and Item Sub-Records show the related records that describe the current record in more detail. For example, to view the list of series, subseries, or sub-subseries records for a particular collection, select the Series Sub-Records tab from the Collection record. See Section I, Hierarchical Archives Navigation below for more information.

Note: Each level will have one fewer sub-records tab in which it can be divided.

C. Archives Numbering

1. *How does the Archives Numbering work?*

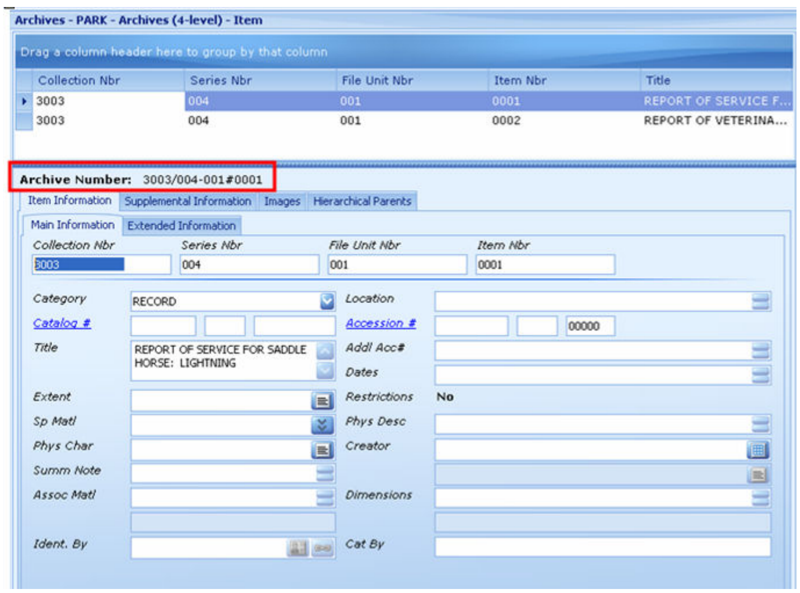
The hierarchical relationships between levels are created and maintained through the numbering of the collection. All Series, File Unit, and Items within a Collection share the same Collection number. If a Series record does not have the correct Collection number information, it will not appear as part of the correct Collection. **ICMS** helps create Archival Numbers with the correct formatting for the program by autofilling as many of the number elements, as possible. See Sections E, F and G below for information on adding related records.

2. *How can I view the hierarchical relationships?*

To view the hierarchical relationships, see Section J below.

3. *How are the archive numbers displayed on the records?*

The full Archive Number is created by merging each of the separate number fields on the data entry screen and adding punctuation to indicate to which level each part refers. The combined Number is visible at the top of the Record Pane just above the first row of tabs, as well as when you use other **ICMS** functions like reports.



When the Archive Number is displayed as a whole, **ICMS** uses the forward slash "/" to indicate a Series within a Collection; a dash "-" to indicate a File Unit within a Series; and the pound sign "#" to indicate an Item within a File Unit.

Example: Item number 0001 contained within Collection 3003, Series 004, File Unit 001 displays as: "3003/004-001#0001

- The system automatically displays these punctuation marks to distinguish between levels. They are not entered as data in the number fields.

- Even if an archival level was skipped for a Collection, the punctuation mark is displayed in the Archive Number.

  Example: 3003/-#0003 is an Item that has no Series or File Unit level parents.

- Punctuation is only entered in the number fields when a Collection or Series is further divided to indicate a Subcollection, Sub-subcollection, Subseries, Sub-subseries, etc.

Note: The period "." is the recommended punctuation to indicate sub-divisions within the Collection and Series levels. The system does not restrict you to that character, but other punctuation such as a - or / to indicate the Subcollection or Subseries may lead to confusion when the Archive Number is viewed as a whole.

4. *Do the numbers have to be unique?*

Yes. Archive Numbers have to be unique. This means that the *combination* of each part of the archive number cannot be duplicated. Although there can be many records with the Item Number "001," there cannot be two Item "001" records with the exact same Collection, Series, and File Unit parents. If you attempt to save a record that has a duplicate number, the system displays a warning and asks you to change the number.

5. *Are there any required fields in the number?*

Yes. On each of the four levels, one number field is a required field: the field for that level's number. For example, on the Series level, the Series Number cannot be blank.

6. *How is the Collection number formatted?*

The Collection Number field format indicates if you are working with a collection or subcollection record. If a record at this level is a subcollection record the number in this field contains a dot (.). A number with two dots indicates a sub-subcollection record. The Collection Number field is required on the Collection level.

Examples:	Collection: 3003	Collection
	Collection: 3003.01	Subcollection
	Collection: 3003.01.01	Sub-subcollection

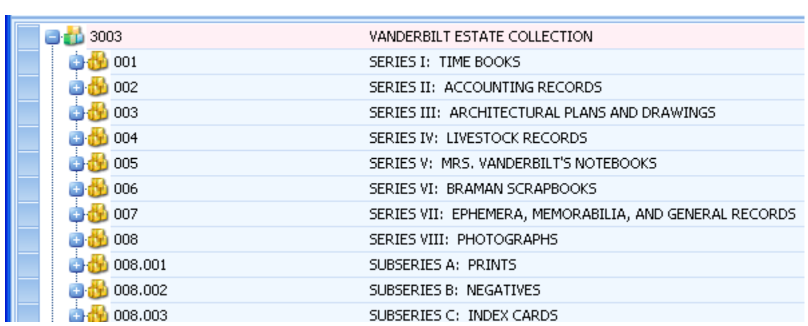
7. *How is the Series number formatted?*

The Archive Number on the Series level is comprised of a Collection and Series number that identifies the series or subseries uniquely within the collection or subcollection. If a record at this level is a subseries record the number in this field contains a dot (.). A number with two dots indicates a sub-subseries record. The Series Number field is required on the Series level.

Examples:

A series called “SERIES VIII: PHOTOGRAPHS” in the Vanderbilt Estate collection
Collection: 3003 Series: 008

A subseries called “SUBSERIES A: PRINTS” within the Photographs series
Collection: 3003 Series: 008.01

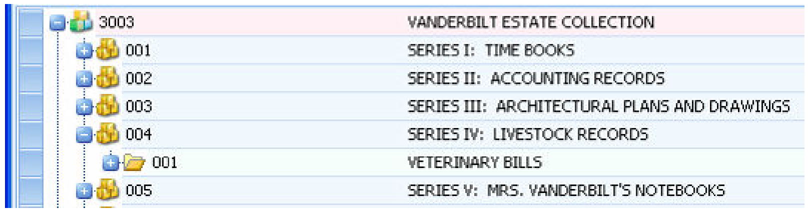


8. *How is the File Unit number formatted?*

The Archive Number on the File Unit level is composed of the Collection, Series, and File Unit number although Series can be skipped by leaving that number blank. Punctuation in the Collection and Series numbers may indicate a subcollection or a subseries. The File Unit Number field is required on the File Unit level.

Example:

A file unit titled “VETERINARY BILLS" within “SERIES IV: LIVESTOCK RECORDS”
Collection: 3003 Series: 004 File Unit: 001

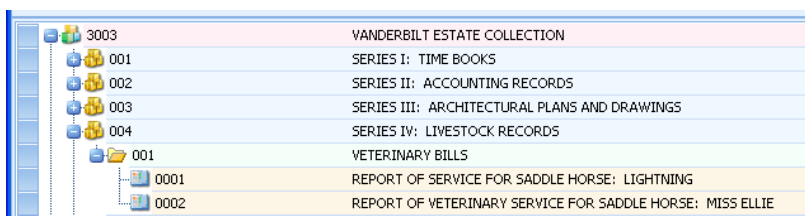


9. *How is the Item level number formatted?*

The Archive Number on the Item level is composed of a Collection, Series, File Unit and Item number although levels can be skipped by leaving that number blank. Punctuation in the Collection and Series numbers may indicate a subcollection or subseries. The Item Number is a required field on the Item level.

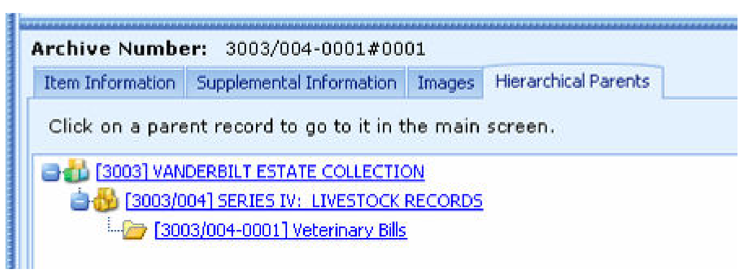
Example:

The document "REPORT OF VETERINARY SERVICE FOR SADDLE HORSE: MISS ELLIE":
Collection: 3003 Series: 004 File Unit: 001 Item: 0002



10. *How can I confirm that my numbering has created the desired relationship?*

To determine if an archive record is associated with the appropriate parent records, in View or Modify mode, click the Hierarchical Parents tab. The immediate parents of the record will be displayed.



For further information on the Hierarchical Parents tab, see Section I below.

11. *What if I make a mistake in my numbering and can't find a record I know I've entered?*

If you have entered an archive record but cannot locate it where you expected it to be in the hierarchy, use one of the following features to assist you in locating the record.

- Word Search on the level where you entered the record
- Hierarchical Browse – see Section J below
- Sub-Records tabs of parent record (use the Load all sub-records option) – see Section I, question 3 below

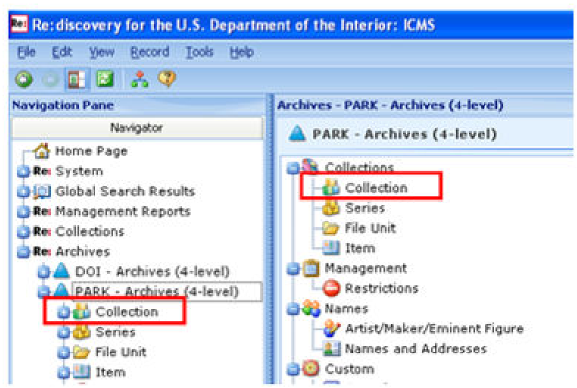
Once you have located the record, modify the archive number to correct its hierarchical placement.

D. Adding a Collection Level Archives Record

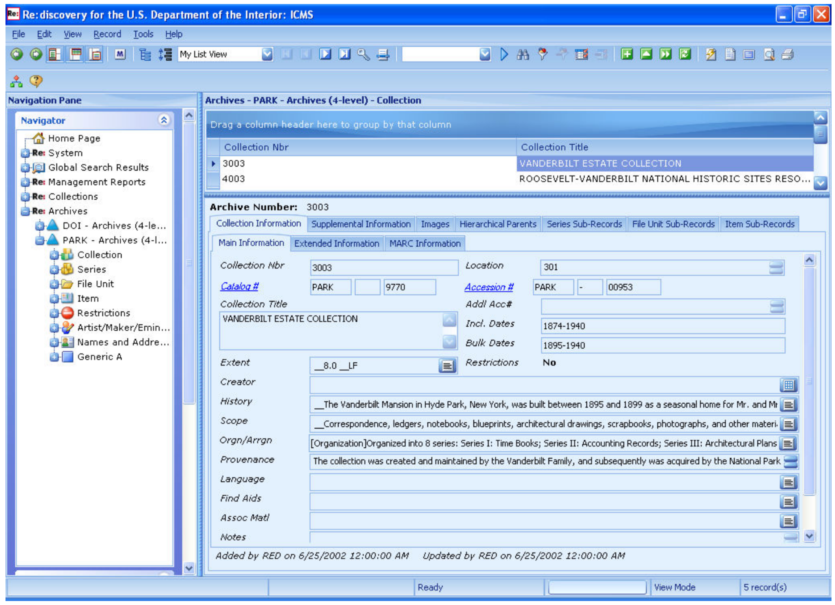
1. *How do I access the Collection Level records?*

To access the collection level in the Hierarchical Archives directory:

- From the Navigation Pane on the left, expand the 4-level directory by clicking the + in front of the directory name and select Collection, *or*
- From the Directory page on the right, double click the Collection option under Collections.



The collection level will open showing the collection records available in the List Pane and the first collection record in the Record Pane.

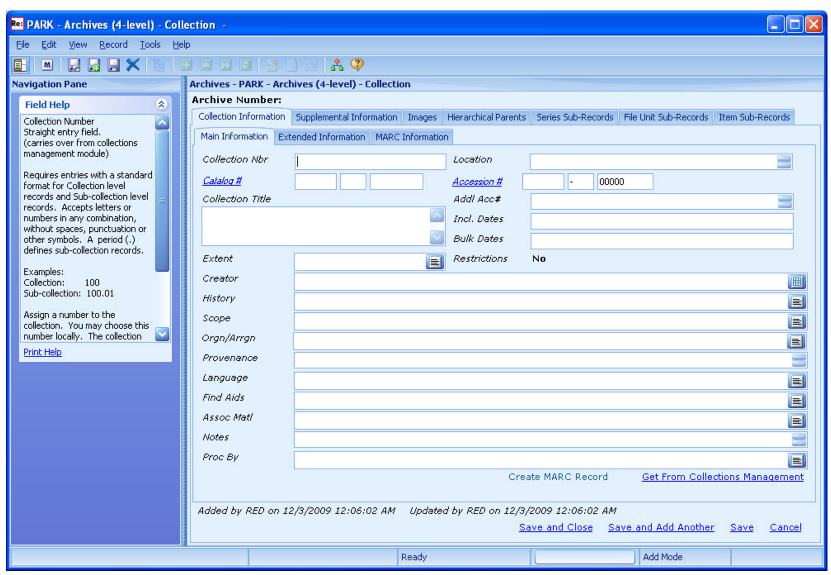


2. *How do I add a collection record?*

To add a collection record:

- Click the Add button on the button bar, *or*
- Select Add New Record from the Edit menu, *or*
- Press F9

A new window will open in Add Mode for you to enter the collection information.



Note: For the Collection Level, archive records that have already been cataloged in the Cultural Resources directory can be transferred to the archives module to automatically enter the information on this screen. See D.3 below for information on how to get the data from the cultural resources directory if it has already been cataloged.

3. *How can I get the data from the Cultural Resources record?*

If you have already entered the data for the archives collection record in the Cultural Resources record, you can transfer that information to the Collection record in the archives directory.

Warning. Data transferred from the collections directory will completely overwrite any data that is currently in the Collection record in the archives module in the corresponding fields.

- To get the existing data from the Cultural Resources catalog record:
- Add a new record by clicking the Add button or selecting Add New Record from the Edit menu.
- Enter only the corresponding catalog number in the Catalog Number field that matches the record in the Cultural Resources directory.
- Click the Get from Collections Management link at the bottom right of the collection page.
- A message will appear indicating that you must first save the record before you can get the data from the Collections directory. Click Yes to save the data and proceed.
- The next message asks if you are sure you want to get the data from the Catalog number you entered in the catalog number field. Click Yes if you want to get the data for the catalog number indicated.
- Once the data is transferred, you will get a confirmation message that the record has been updated. Click OK.

4. *What if I get a message that my archives directory is not connected to a cultural resources directory?*

You must set up table sharing between directories to be able to transfer the information between them. Refer to Section VII in Chapter 9, System Options for information on setting up file sharing between the cultural resources and archives directories.

5. *Which fields are updated from the cultural resources record?*

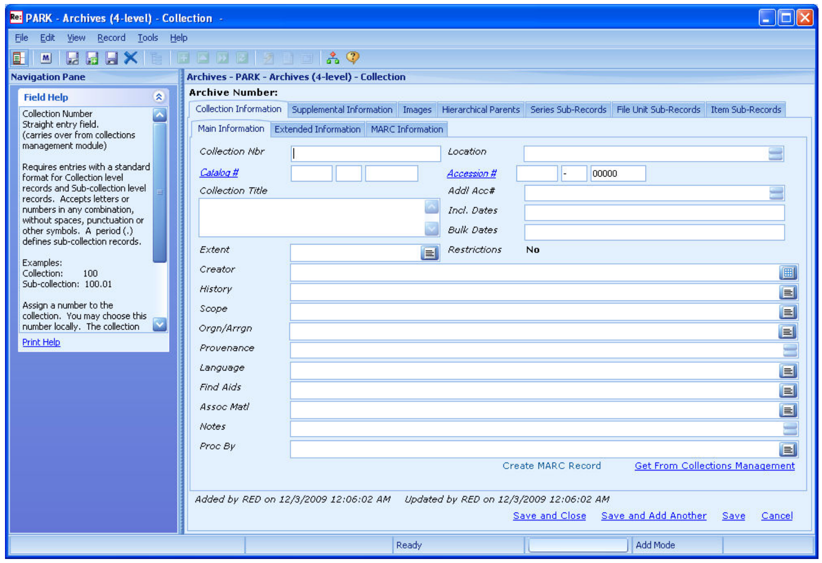
For information on which fields are transferred between the Archives Collection record and the cultural resources record, see the field-by-field instructions below and Section II of Chapter 2.

6. *Can I transfer information from the archives Collection record to the Cultural Resources record?*

Yes. You can transfer information from a Collection record to a Cultural Resources record by going to the Cultural Resources directory in the Collections management module and using the Get from Archives Module function. See Section II.C.7 of Chapter 2 for information on using this function from the Cultural Resources record.

7. *How do I complete the fields on the Collection Level Main Information tab?*

Follow the field-by-field instructions below for completing the information on the collection record. Field help for each field is also available in the Navigation Pane on the right.



Collection Number (Collection Nbr)

Straight entry field.
(carries over from the Local Collection # field in the collections management module)

Requires entries with a standard format for Collection level records and Subcollection level records. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols. A period (.) defines subcollection records.

Examples:	Collection:	100
	Subcollection:	100.01

Assign a number to the collection. You may choose this number locally. The collection number links all the levels of a collection and appears on the screen for all records in the collection. The collection number is not the same as the catalog number.

Location

Memo field (F12 to expand, or right click and zoom).
History tracking field that links to the Location supplemental record.
(carries over from the collections management module – Location field)

Enter the physical storage location of the collection, starting with the most general location. For example, enter the building number or name, the room number, the cabinet number, and the shelf number.

For specimens stored outside the unit, enter the name of the institution where the specimens are located, such as SEAC or University of Texas.

Develop standardized terms and abbreviations for storage areas and use these consistently. Enter locations from general to specific. Separate entries with a space.

A list of recommended abbreviations:

HS	Historic Structure
BLDG	Building
RM	Room
CAB	Cabinet
FCAB	File Cabinet

FCDR	File Cabinet Drawer
MC	Map Case
C	Case
SEC	Section
SH	Shelf
R	Rack
BX	Box
DR	Drawer
U	Unit

Example: HS 1 RM 101 SH 5
BLDG 18 RM 1 U 13

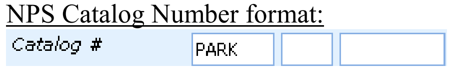
The program allows you to track changes in location. If you modify a location, the program will include the Location supplemental in the Track Changes window when you save the record. A history of location changes appears in the Location supplemental record.

Note: If you are going to export MARC records, include the unit acronym in the location. This will link to the Names and Addresses database so that the repository name and address will export.

Catalog Number (Catalog #)

For NPS, this is a 3-part 12-character field.
For DOI, this is a regular, 20-character straight entry field.
(use to match with cultural resources record in the collections management module)

NPS Catalog Number format:



a. The first part is the four-letter park acronym, in the form of "AAAA." (The acronym will autofill from the record you were viewing just prior to adding a new record. You can change it, if necessary.)

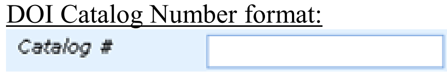
b. Leave this space blank if the park has only one museum collection.

If the park has different units that have separate accession and catalog systems, enter a museum collection designation in the form of a letter, for example, A, B, C. Only a few parks will use such a designation. The Chief Curator must approve this designation. Review requests to use a designation with the SO curator. Send requests in writing to the Chief Curator, Museum Management Program, Cultural Resources Stewardship and Partnership Programs.

c. The third part is the unique sequential number assigned to a collection, for example, 999999.

Examples: SAFR 23
COLOJ 345. The Colonial number contains a "J" as a designation for the Jamestown museum collection.

DOI Catalog Number format:



Enter a catalog number using a standard format. The first part of the catalog number should be your unit acronym.

Example: IACB 1999.04.01

Note: The catalog number links the collection record to the catalog record in the collections management module. Click on the Catalog # link on the screen to view the catalog record.

Accession Number (Accession #)

For NPS, this is a 3-part 10-character field.
For DOI, this is a regular, 20-character straight entry field.
(carries over from the Accession # field in the collections management module)

Enter the earliest accession number for the collection.

NPS Accession Number format:

Accession # | PARK | - | 00000

a. The first part is the four-letter park acronym, in the form of "AAAA." (The acronym will autofill from the record you were viewing just prior to adding a new record. You can change it, if necessary.)

b. The second part is a hyphen, which distinguishes the accession number from the catalog number. (The hyphen will autofill when you add a record. You can change it, if necessary.)

If the park has different units that have separate accession and catalog systems, enter a museum collection designation in the form of a letter, for example, A, B, C in place of the hyphen. Only a few parks will use such a designation.

The Chief Curator must approve the designation. Review requests to use a designation with the SO curator. Send requests in writing to the Chief Curator, Museum Management Program, Cultural Resources Stewardship and Partnership Programs.

c. The third part is the 5-digit identification number assigned to an accession, for example, 99999. The program automatically pads the number with zeroes.

Examples: EDIS-00001
NOCAS00004. The North Cascades accession number contains an "S" to indicate a separate collection.

DOI Accession Number format:

Accession #

Enter the number for the accession using a standard format. The first part of the catalog number should be your unit acronym.

Example: IACB 1999.04

Note: This is the same as the accession number for the corresponding cultural resources record in the collections management module.

The accession number links the collection level record to the accession record in the collections management module. Click on the Accession # link on the screen to view the accession record.

Additional Accession Numbers (Addl Acc#)

Memo field (F12 to expand, or right click and zoom).
(carries over from the Additional Accession # field in the collections management module)

An archival collection may be composed of many accessions. If a new accession is received that has the same provenance as one or more accessions already cataloged as part of a single collection, that new accession should be added as an 'accretion' to the existing catalog record. Update volume, date, and descriptive information as necessary, and modify the Additional Accession numbers to include the number of the new accession. Use the same format for accession numbers that you did in the Accession # field above.

Examples: EDIS-00001
IACB 1999.04

Note: The collection-level survey record and finding aids will note if a collection includes multiple accessions. Copies of the collection-level survey description belong in the accession file of each accession that forms part of the collection.

Collection Title

Memo field (F12 to expand, or right click and zoom).
(carries over from the Objects field in the collections management module)

The collection title is the name by which the archives and/or manuscript material is known. It consists of the creator's name, followed by the physical form of the collection.

Name element: Give the full name of the creator or collector of the archival materials, whether an organization, individual, family, or group. Use direct order, first name followed by the last name. Do not invert the name. Do not include articles such as "the" or "a" at the beginning of the name. Use all capital letters.

Form of material: Record a term that characterizes the form of material in the collection. For collections containing a single form of material, use a material designation, such as letters or photographs. For collections containing multiple forms of materials, use

- "Papers" for personal papers of individuals or families
- "Records" for the archives of organizations, corporate bodies, or groups
- "Collection" for a group of materials that was formed artificially around a person or subject

Examples: WARREN SEARS NICKERSON PAPERS
THEODORE ROOSEVELT FAMILY PHOTOGRAPH COLLECTION
HARMONY HALL FIELD RECORDS
YORK CORPORATION RECORDS

Inclusive Dates (Incl. Dates)

Straight entry field.
(carries over from the Dates: Inclusive Dates field in the collections management module)

Enter the inclusive dates of the materials found in the collection, for example, 1900-1960. Inclusive dates tell you that the earliest document dates from the first date and the latest document dates from the latter date. If date is approximate, use "circa," followed by a blank space - for example circa 1900-1960.

Bulk Dates

Straight entry field.
(carries over from the Dates: Bulk Dates field in the collections management module)

Enter the date range for the majority of the collection, for example, 1928-1957 may be the bulk dates for a collection with inclusive dates of 1900-1960. The bulk dates indicate that most of the collection dates from 1928-1957. If date is approximate, use "circa," followed by a blank space - for example circa 1928-1957.

Note: Do not enter bulk dates without inclusive dates.

Extent

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon to expand the field.
(carries over from Item Count, Quantity, and Storage Unit fields in the collections management module)

The field will expand into three subfields: Count, Extent, and Type of Unit. An underline separates the subfield entries on the collection screen.

Count (Straight entry) (from Item Count in collections management module)

Enter the number of items in the collection, if you know the exact number of items. Most collections do not have an item count. Count a multiple-page document, such as a bound volume, multi-page letter, or manuscript as one item. If an item count is necessary, use the conversion factor of 1,600 sheets equals one linear foot.

Extent (Memo field) (from Quantity in collections management module)

Enter the number of linear or cubic feet. Use decimals for fractions of linear or cubic feet, for example 1.4.

Type of Unit (User-built table--F5, Ctrl-F5) (from Storage Unit in collections management module)

Choose a unit of measure from the user-built table. This is the unit of measure for the count or the extent. Use the abbreviation "LF" for linear feet and "CF" for cubic feet. Use "EA" if there is only an individual count.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click <u>Add Term</u>. After entering the term, click <u>Save Change</u>, then click <u>Select</u> to enter the term in the field.

Restrictions

System generated field.

It will display ‘No’ if there are no restrictions entered in the Restriction supplemental for the record. It will display ‘Yes’ if there is a Restriction supplemental for the record.

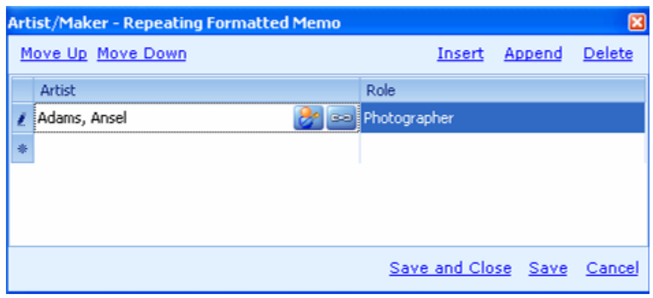
Note: Restriction supplementals will carry over from the cultural resources record when using Get From Collections Management.

For more information on the Restriction supplemental, see Section XIX of Chapter 3, Supplemental Records.

Creator

Repeating Formatted Memo.
(carries over from the Artist/Maker field in the collections management module)

Type in the field, press F12 or click the chart icon to expand the field. The Artist/Maker – Repeating formatted memo screen appears with two repeatable subfields: Artist and Role.



Use this field to record the creator(s) of the archival collection. For people, enter the last name, first name and middle initial.

Note: The records creator is the person or organization that created the entire collection, regardless of who may have authored individual documents. For example, Thomas Edison would be regarded as the creator of the Thomas Edison Papers in their entirety -- even the letters that he would have received from Harvey Firestone, Henry Ford, or other individuals. Firestone and Ford would have been the authors of the letters sent to Edison, but, because Edison filed those letters among his own papers, Edison is the creator of the records. In archives, the records creator is not necessarily synonymous with the author or artist.
If you wish to list the names of individual letter writers, photographers, or other authors or artists, you should do so in the Description field (for the collection level) or the Summary Note field (for the file unit and item levels), and not in the Creator field.

Artist (User-built table -- F5, Ctrl-F5) Linked to the Artist/Maker/Eminent Figure associated module.

For archival/manuscript collections, enter the name of the person, family, or corporate body chiefly responsible for creating or assembling the collection. Refer to the Section II, Chapter 2, for further information.

As you type, the name will complete from an authority table of names in the Artist/Maker associated module. You can also press F5 or click the artist icon to view and select names from the table.

To add an artist/maker to the table, right-click in the Artist field and choose

Browse Authority Table or press Ctrl-F5. Click Add to add a new entry. The Artist/Maker/Eminent Figure screen allows you to enter information such as birth and death years, accomplishments, and nationality. The entry you add will appear in the table.

Refer to Section XI of Chapter 4 for information on the Artist/Maker/Eminent Figure associated module.

The entry from the table will appear on the Artist/Maker expanded screen. Click Save and Close to add the entry to the field on the main screen.

Note: The link icon next to the artist icon allows you to view the artist/maker record for your entry.

Role (User-built table – F5 , Ctrl-F5)

Add information such as "attributed" or "author".

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

You can enter multiple rows. Press the down arrow key, or click Insert or Append, to enter additional creators for this record. Click Save to save and return to the main window. Multiple terms are separated by an underline (__). Rows are separated by a double bar (||).

History

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.
(carries over from the History field in the collections management module into the Expansion Note subfield)

The field will expand into two subfields: Brief Note and Expansion Note (both memo fields). In most cases, it is sufficient to use only one of these subfields - preferably, the Expansion Note - but not both. If the Expansion Note is unusually long, then it is acceptable to enter a one- or two-sentence summary in the Brief Note as well.

Enter a biographical or historical note about the creator of the collection. Enter information that will help to make the nature and scope of the collection clear. Use mixed case when entering data.

For personal papers, provide significant information about the life and activities of the person who generated the collection, including:

- dates and places of birth and death
- variant names
- education

- occupation
- significant accomplishments

For family collections, identify the members of the family and their relationships and significant biographical facts about each.

For corporate bodies, identify the structure, function, purpose, and history of the organization that created or accumulated the collection, including:

- dates of incorporation and dissolution
- location of operations
- variant names
- hierarchical location (sibling and parent organizations)
- corporate functions, activities and products
- brief administrative history

Example of historical note: Warren E. Miller, 1924-1992. Mr. Miller was also known as "Birney" Miller referring to his interest in street cars and in particular the "Birney Safety Car" mass produced in the years after the First World War. From 1946 to 1987, an interest in railroads led Mr. Miller to collect, buy and sell photographs through the operation of his business, the Railway Negative Exchange.

Example of historical note for Bureau-created resource management records: Identification study, 1950-1951. Conducted by John Price under Thomas Styles. Excavations from four sites within the Blue Ridge Parkway: Green Knob Spring, the Mike Green Site, the Benge Scatter, and the Sims House. The historic Sims House artifacts were collected following suspected arson of the house. The other three sites were prehistoric. Several of the artifacts from these sites were sent to Harpers Ferry Center for use in a park exhibit on material culture of the area.

Scope

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.
(carries over from Description field in collections management module into the Expansion Note subfield)

The field will expand into two subfields: Summary Note and Expansion Note. An underline separates the entries in the two subfields on the collection screen. In most cases, it is sufficient to use only one of these subfields - preferably the Expanded Summary Note - but not both.

Enter information about the contents, nature and extent of the collection, including

- specific types and forms of material
- presence of graphics or other non-textual materials

- functions or activities resulting in the creation of the records

- most significant topics, events, persons, places represented

Use mixed case when entering data.

Example of Scope Note: Correspondence, notes, forms, newspapers, drawings, blueprints, diazo prints, maps, ledger sheets, and photographs relating to land acquisitions made by the State of Virginia in connection with the establishment of Shenandoah National Park. Most of the materials are dated between 1927 and 1934, when most of the land acquisitions were made. Also included are tax appraisals for the period 1980-1993.

Organization/Arrangement (Orgn/Arrgn)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.
(carries over from the Organization and Arrangement fields in the collections management module)

The field will expand into two subfields: Organization and Arrangement. Use only one subfield or the other, but not both. Use mixed case when entering data.

Organization (memo field):

Use this subfield if the collection is subdivided into series. List each series, identifying them with Roman numerals. For example, "Organized into three series: Series I, Correspondence; Series II, Diaries; Series III, Photographs."

Arrangement (memo field):

Use this subfield if the collection is not subdivided into series, in order to describe the pattern in which the individual files or documents in the collection are arranged. For example, "Arranged alphabetically," "Arranged chronologically," "Arranged according to alpha-numeric code," etc. In some cases, multiple levels of arrangement may be discerned, such as "Arranged alphabetically by name of correspondent, and hereunder chronologically by date of letter."

Provenance

Memo field (F12 to expand, or right click and zoom).
(carries over from the Provenance field in the collections management module)

Describe the collection's origin and history of ownership from the time of creation to the time of accession. Include information on successive transfers of ownership and custody of the materials. Include the date when individual items or groups of items were first brought together in their current arrangement or collation.

Example of Provenance: From 1946 to 1987, Warren E. Miller operated the Railway Negative Exchange, which collected and traded photographs on a wide range of transportation subjects. A major portion of this collection originated from the activities of the Board of State Harbor Commissioners for the Harbor of San Francisco. In 1987, he donated his collection of maritime-related photographs to San Francisco Maritime National Historical Park.

Language

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.
(carries over from the Language field in the collections management module into the first subfield)

The field will expand into two subfields: Language Note and Language Code. An underline separates the subfield entries on the collection screen.

Language Note (Memo field):

Record the language(s) of the materials in the collection.

Language Code (User-built stacked table -- F5, Ctrl-F5, F12):

Enter the code(s) from the OCLC-MARC Code Lists for the language(s) of the materials in the collection.

Example:	eng	(for English)
	fre	(for French)
	spa	(for Spanish)

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click <u>Add Term</u>. After entering the term, click <u>Save Change</u>, then click <u>Select</u> to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the <u>Add</u> link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click <u>Delete</u> or press Ctrl-Delete to remove unwanted entries.

Finding Aids
(Find Aids)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field. (carries over from the Finding Aids field in the collections management module)

The field will expand into seven pairs of subfields and one memo field. Each pair of subfields consists of Finding Aid and Level of Control. An underline separates the subfield entries on the collection screen.
Record any existing finding aids and the level of control they provide for materials in the collection. This includes finding aids developed by the creator, park, and in the Re:discovery archives module.

Finding Aid (Memo field):

Enter a finding aid, such as a register, inventory, calendar, index, or accession list. A finding aid indicates the type of administrative and intellectual control that you have over the materials.

Level of Control (Bureau controlled table--F5):

Choose one of the entries from the table: Collection Level, Series Level, File Unit Level, Item Level. The program will pair this entry with the finding aid. The level of control indicates the degree of control that you have over the materials.

As you type, the term will complete form the list of acceptable terms. Press F5 or click the down arrow to view and select a term from the table.

Example: Index of vessel names __item level.
Box/folder list in Archives __file unit level.

Note: Enter a citation for a published guide in the Publication Citations supplemental.

You can enter up to seven pairs of finding aid/level of control.

Other (Memo field):

Enter additional information about the finding aids.

Associated Materials/Related Collections (Assoc Matl)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.
(carries over from the Related Collection field in the collections management module)

The field will expand into seven pairs of subfields and one memo field. Each pair of subfields consists of Related Collection and Collection Custodian. An underline separates the subfield entries on the collection screen.

Record information about materials related to the collection from the same or closely related provenance. Related collections are not reproductions, published versions, or studies based on the materials.

Related Collection (Rel Coll) (Memo field):

Enter the title of associated materials and the collection number if needed.

Collection Custodian (Coll Custodian) (User-built table--F5, Ctrl-F5):

If parts of a collection are located in more than one repository, enter the name of the custodian of the related materials. The program will pair this entry with the name of the related collection.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Example: E.W. Merrill Photograph Collection _Sheldon Jackson College

California. Department of Finance. (Links Collection) Historical record photographs. (F3254:1-307) _California State Archives

You can enter up to seven pairs of related collection/collection custodian.

Other (Memo field):

Enter additional information about associated materials.

Note: The Related Collections field in the collections management module is an unformatted memo field. The data from this field will carry over to the Other subfield in the Associated Materials/Related Collections field in the archives module. You must manually sort the data into the Related Collection/Collection Custodian subfields, if desired.

Notes

Memo field (F12 to expand, or right click and zoom).

Enter additional notes on the material.

Processed By
(Proc By)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Processed By and Processing Date. An underline separates the subfield entries on the collection screen.

Processed By (Memo field):

Enter the last name of the person who actually cataloged or processed the material.

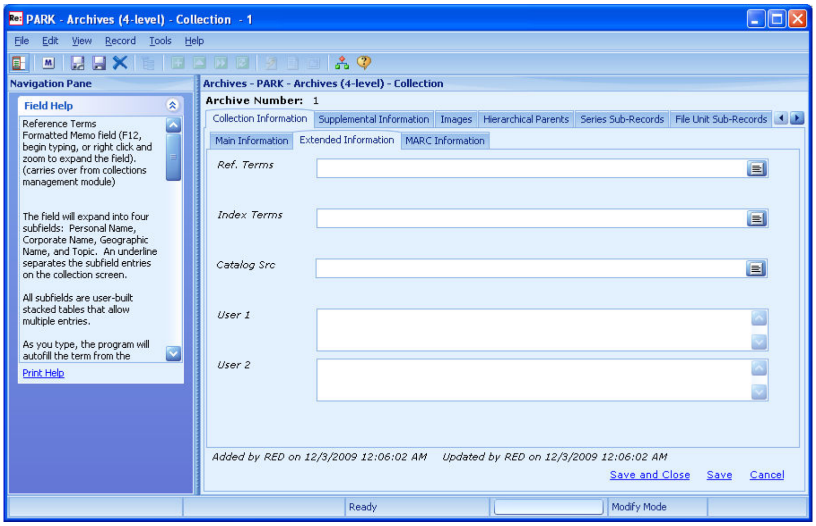
Processing Date (Straight entry field):

Enter the processing date.

You have completed the fields on the Main Information tab. To go to the next page, press Ctrl-N or click on the Extended Information tab.

8. *How do I complete the fields on the Extended Information tab?*

Follow the field-by-field instructions below for completing the fields on the Extended Information tab.



Reference Terms (Ref. Terms)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.
(carries over from Reference Terms field in the collections management module)

The field will expand into four subfields: Personal Name, Corporate Name, Geographic Name, and Topic. An underline separates the subfield entries on the collection screen.

All subfields are user-built stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Personal Name:

Enter personal or family names that are subjects of the materials in the collection. That is, the material is about the person or family. You can also enter names of additional creators, such as correspondents.

Enter names in inverted order, last name followed by the first name. For family names, enter the last name of the family followed by "Family."

Example: Ford, Henry
Sandburg Family

Corporate Name:

Enter corporate names that are subjects of the materials in the collection. A corporate body has a particular name and acts as a group. Some examples of corporate bodies are government agencies, business firms, nonprofit associations, religious bodies and vessels.

Enter the name in direct order.

Example: Ford Motor Company
CA Board of State Harbor Commissioners for San Francisco Harbor

Geographic Name:

Enter geographic place names that are subjects of the materials in the collection.

Example: Detroit, Michigan
Ferry Building (San Francisco, CA)

Topic:

Enter terms about the materials in the collection.

Example: Automobile
Harbors San Francisco (Calif.)

Note: The table for reference term subfields includes a field for description. If you choose the term from an established authority list, such as the Library of Congress Subject Headings, enter the authority in the description. If you use a local term, enter "Local" in the description.

Index Terms

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field. (carries over from the Index Terms field in the collections management module)

The field will expand into four subfields: Form, Genre, Occupation, and Function. An underline separates the subfield entries on the main screen.

All subfields are user-built, stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click <u>Add Term</u>. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Form:

Enter terms that designate the physical characteristics of the materials in the collection.

Example: daybooks
diaries
photoprints

Genre:

Enter terms that designate the style or technique of the intellectual contents of the materials in the collection.

Example: essays
biographies
marine photographs

Occupation:

Enter the occupations reflected in the collection.

Example: physician
pile-driver operator, barge mounted (construction)

Function:

Indicate the activities or functions that brought the records into being.

Example: stabilization project
monitoring environment
San Francisco--waterfront--construction progress

Note: The table for index term subfields includes a field for description. If you choose the term from an established authority list, such as the Art & Architecture Thesaurus, enter the authority in the description. If you use a local term, enter "Local" in the description.

Catalog Source (Catalog Src)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Original Agency and Conventions. An underline separates the subfield entries on the collection screen.

Original Agency (memo field):

Record either the National Union Catalog (NUC) code or the individual unit name.

Conventions (Bureau controlled stacked table --F5):

Enter the code for the description convention that was used for the material. Choose one of the codes from the table. The code will usually be "appm" for Hensen, Steven L. Archives, personal papers, and manuscripts (Washington: Library of Congress). This field is specifically needed for exporting MARC records.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

User 1-2

These 2 fields are user defined fields. Users with Administrator rights may define the purpose of this field.

Right-click in the field and choose Properties from the menu to change the Label, Field Type, and User Help. In the Field Properties window, click the Modify button or select Modify This Record from the Edit menu. Click on the Default Label/Help tab. Enter a new label and select the field type.

Refer to Chapter 1, System Basics for information on field types.

9. *How do I enter information on the MARC tab?*

MARC data is only available on the Collection Level. You can create the MARC information in two ways:

- Have the system generate the MARC tags using the MARC mapping template within the program by clicking Create MARC Record (this option is only available in View Mode).
- Enter individual MARC tags one at a time from the MARC Information tab.

Refer to Section M below for details on using the MARC Information tab.

Use of the MARC Information tab is optional. If you are not familiar with MARC cataloging protocols or do not intend to send MARC records to other systems, you do not need to use this feature.

E. Adding a Series Level Archives Record

10. *How do I add a series record?*

There are three ways to add a series record:

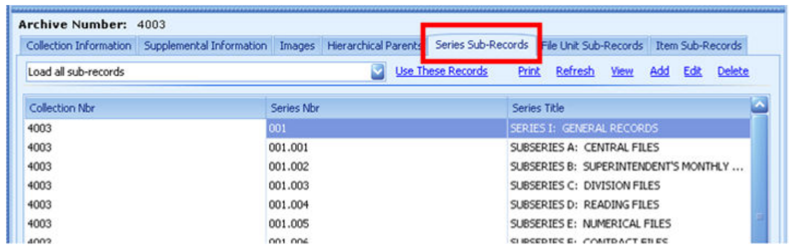
- From the Collection record that you want the series record to be associated, *or*

- From the Series level screen, *or*
- From the Hierarchical Browse view. See Section J below for information on using the Hierarchical Browse view.

11. *How do I add a series record from a collection record?*

To add a series record from a collection record:

- Go to the Collection record which you want to associate a series record.
- Click on the Series Sub-Records tab.



Note: If other series records are already associated with the current collection record, you will see these in the list.

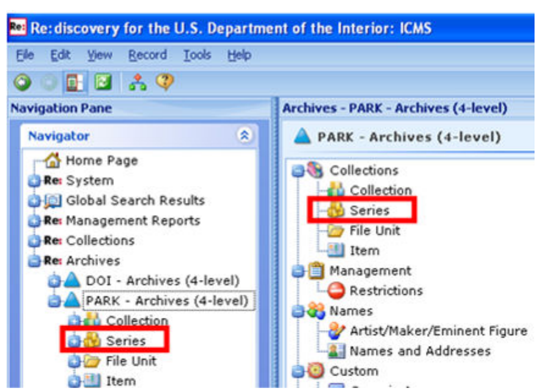
- To add a new series record, click the Add link in the upper right of this screen.

A new window will open in Add Mode displaying the screen for a Series level record. The Collection number will autofill from the Collection record to which you are adding the Series record. Follow the field-by-field instructions below for completing the information.

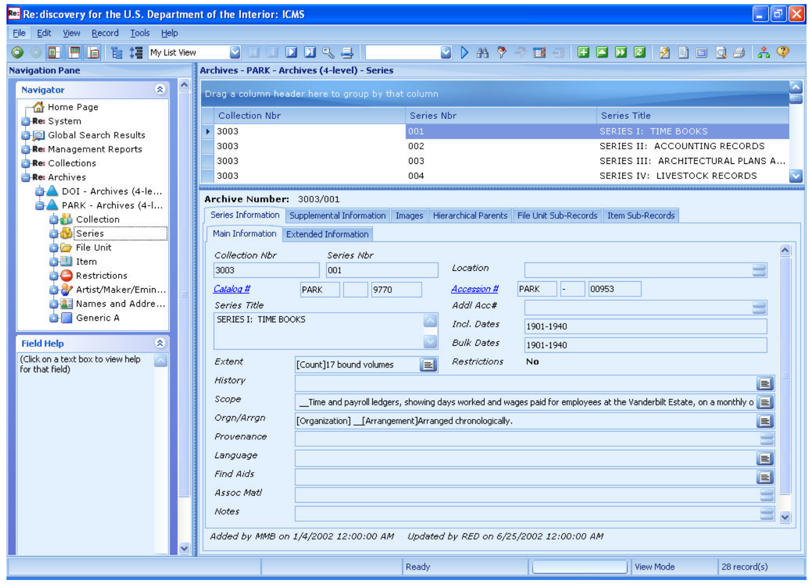
12. *How do I add a series record from the Series Level screen?*

To add a series record from the Series Level screen:

- From the Navigation Pane on the left, expand the 4-level directory by clicking the + in front of the directory name and select Series, *or*
- From the Directory page on the right, double click the Series option under Collections.



The series level will open showing the series records available in the List Pane and the first series record in the Record Pane.

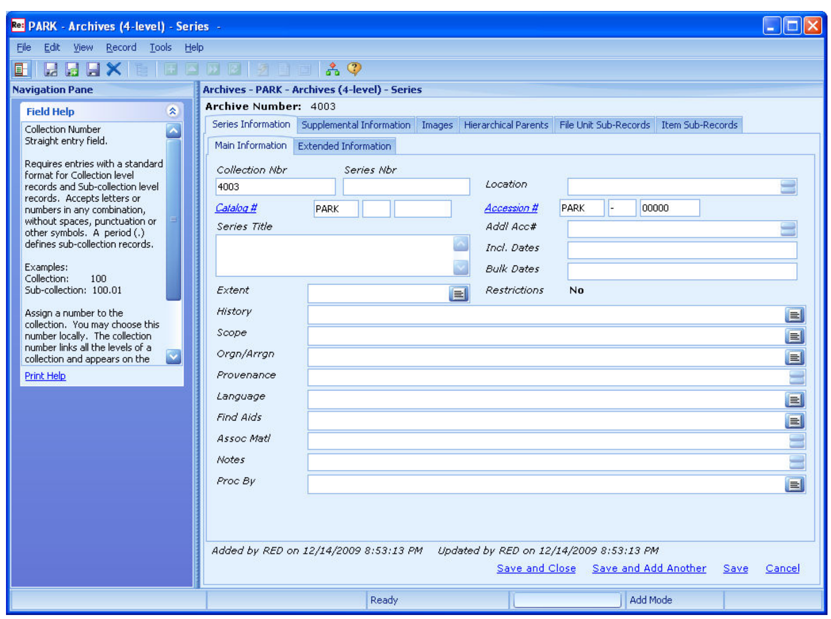


- Click the Add button, select Add New Record from the Edit menu, or press F9 to add a new record.

A new window will open in Add Mode displaying the screen for a Series level record. The Collection number will autofill from the Series record you were viewing prior to adding a new record. Follow the field-by-field instructions below for completing the information.

13. *How do I complete the fields on the Series Level Main Information tab?*

Follow the field-by-field instructions below for completing the information on the series record. Field help for each field is also available in the Navigation Pane on the right.



Collection Number (Collection Nbr)

Straight entry field.

Requires entries with a standard format for Collection records and subcollection records. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols. A period (.) defines subcollection records.

The collection number will autofill from the collection record you were on if you add a series record from the collection record's Series Sub-Records tab. If you add a Series record directly from the Series Level, the collection number will autofill from the series record you were viewing prior to adding a record.

Examples: Collection: 100
Subcollection: 100.01

Assign a number to the collection. You may choose this number locally. The collection number links all the levels of a collection and appears on the screen for all records in the collection. The collection number is not the same as the catalog number.

Series Number (Series Nbr)

Straight entry field.

Requires entries with a standard format for Series or Subseries records. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols. A period (.) defines subseries records.

Examples: Collection 1001, Series 001
Collection 1001, Subseries 001.001
Collection 1001, Sub-subseries 001.001.001
Collection 1001, Sub-sub-subseries 001.001.001.001
Subcollection 1001.01, Series 001
Subcollection 1001.01, Subseries 001.001

Assign a number to the series, subseries, etc. You may choose this number locally.

Note: Series, subseries, sub-subseries, etc., are natural groups of documents arranged and maintained as units within a collection. The materials in a series possess a shared creation, receipt, format, or function. In general, a series or subseries is a related group of materials composed of many folders or boxes. Different series tend to have different alphabetical, chronological, or numerical filing schemes.

Location

Memo field (F12 to expand, or right click and zoom).
History tracking field that links to the Location supplemental record.

Enter the physical storage location of the collection, starting with the most general location. For example, enter the building number or name, the room number, the cabinet number, and the shelf number.

For collections stored outside the unit, enter the name of the institution where the collections are located, such as SEAC or University of Texas.

Develop standardized terms and abbreviations for storage areas and use these consistently. Enter locations from general to specific. Separate entries with a space.

A list of recommended abbreviations:

HS Historic Structure

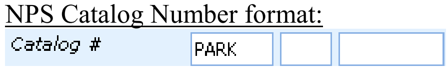
BLDG	Building
RM	Room
CAB	Cabinet
FCAB	File Cabinet
FCDR	File Cabinet Drawer
MC	Map Case
C	Case
SEC	Section
SH	Shelf
R	Rack
BX	Box
DR	Drawer
U	Unit

Examples: HS 1 RM 101 SH 5
BLDG 18 RM 1 U 13

The program allows you to track changes in location. If you modify a location, the program will include the Location supplemental in the Track Changes window when you save the record. A history of location changes appears in the Location supplemental record.

Catalog Number (Catalog #)

For NPS, this is a 3-part 12-character field.
For DOI, this is a regular, 20-character straight entry field.
(use to match with cultural resources record in the collections management module)

Enter the catalog number for the collection to which the series belongs. Every collection should have a catalog number and a collections level record in the collections management module. If for some reason the series has a separate catalog number, enter the catalog number for the series. For each catalog number you must complete a catalog record in the collections management module.
<u>NPS Catalog Number format:</u>


a. The first part is the four-letter park acronym, in the form of "AAAA." (The acronym will autofill from the record you were viewing just prior to adding a new record. You can change it, if necessary.)

b. Leave this space blank if the park has only one museum collection.

If the park has different units that have separate accession and catalog systems, enter a museum collection designation in the form of a letter, for example, A, B, C. Only a few parks will use such a designation. The Chief Curator must approve this designation. Review requests to use a designation with the SO curator. Send requests in writing to the Chief Curator, Museum Management Program, Cultural Resources Stewardship and Partnership Programs.

c. The third part is the unique sequential number assigned to a collection, for example, 999999.

Examples: SAFR 23
COLOJ 345. The Colonial number contains a "J" as a designation for the Jamestown museum collection.

DOI Catalog Number format:

Enter a catalog number using a standard format. The first part of the catalog number should be your unit acronym.

Example: IACB 1999.04.01

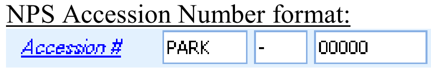
Note: The catalog number links the collection record to the catalog record in the collections management module. Click the Catalog # link on the screen to go to the catalog record.

Accession Number (Accession #)

For NPS, this is a 3-part 10-character field.
For DOI, this is a regular, 20-character straight entry field.
(carries over from the Accession # field in the collections management module)

Enter the earliest accession number for the collection to which the series belongs. This is the same as the accession number for the corresponding collection level record in the collections management module. If for some reason the series has an accession number different from the earliest accession number, enter the accession number for the series.

NPS Accession Number format:



a. The first part is the four-letter park acronym, in the form of "AAAA." (The acronym will autofill from the record you were viewing just prior to adding a new record. You can change it, if necessary.)

b. The second part is a hyphen, which distinguishes the accession number from the catalog number. (The hyphen will autofill when you add a record. You can change it, if necessary.)

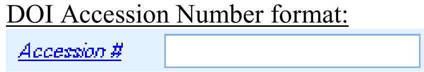
If the park has different units that have separate accession and catalog systems, enter a museum collection designation in the form of a letter, for example, A, B, C in place of the hyphen. Only a few parks will use such a designation.

The Chief Curator must approve the designation. Review requests to use a designation with the SO curator. Send requests in writing to the Chief Curator, Museum Management Program, Cultural Resources Stewardship and Partnership Programs.

c. The third part is the 5-digit identification number assigned to an accession, for example, 99999.

Examples: EDIS-00001
NOCAS00004. The North Cascades accession number contains an "S" to indicate a separate collection.

DOI Accession Number format:



Enter the number for the accession using a standard format. The first part of the catalog number should be your unit acronym.

Example: IACB 1999.04

Note: This is the same as the accession number for the corresponding collection level record in the collections management module.

The accession number links the collection level record to the accession database file. Click the Accession # link on the screen to go to the accession record.

Additional Accession Numbers (Addl Acc#)

Memo field (F12 to expand, or right click and zoom).

A series may be composed of many accessions, as long as the accessions have the same provenance. Enter the additional accession numbers associated with the series. Use the same format for accession numbers that you did in the Accession # field above.

Examples: EDIS-00001
IACB 1999.04

Series Title

Memo field (F12 to expand, or right click and zoom).

The series, subseries, sub-subseries, or sub-sub-subseries title usually refers to one or more of the following attributes of a group of records: physical form, source, subject, or function.

Examples: County Plan Proposals
Director's Correspondence
Policy Issuances
Case Files
Correspondence Concerning Livestock Inspections
Accounting Ledgers

Use all capital letters when entering data into this field.

Indicate in the title whether the group of records constitutes a series, subseries, sub-subseries, or sub-sub-subseries.

Designate series with Roman numerals:
SERIES I: COUNTY PLAN RECORDS
SERIES II: DIRECTOR'S CORRESPONDENCE

Designate subseries with capital letters:
SUBSERIES A: POLICY ISSUANCES
SUBSERIES B: CASE FILES

Designate sub-subseries with Arabic numerals:
SUB-SUBSERIES 1: CORRESPONDENCE CONCERNING LIVESTOCK INSPECTIONS
SUB-SUBSERIES 2: ACCOUNTING LEDGERS

Designate sub-sub-subseries with lower case letters:
SUB-SUB-SUBSERIES a: DIARIES
SUB-SUB-SUBSERIES b: PRESS RELEASES

Inclusive Dates

Straight entry field.

(Incl. Dates)

Enter the inclusive dates of the materials found in the series, for example, 1945-1967. Inclusive dates tell you that the earliest document dates from the first date and the latest document dates from the last date.

If the date is approximate, use "circa," followed by a blank space - for example, circa 1945-1967.

Bulk Dates

Straight entry field.

Enter the date range for the majority of the series, for example, 1950-1957 may be the bulk dates for a series with inclusive dates of 1945-1967. The bulk dates indicate that most of the series dates from 1928-1957.

If the date is approximate, use "circa," followed by a blank space - for example, circa 1928-1957.

Note: Do not enter bulk dates without inclusive dates.

Extent

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon to expand the field.

The field will expand into three subfields: Count, Extent, and Type of Unit. An underline separates the subfield entries on the series screen.

Count (Straight entry)

Enter the number of items in the series, if you know the exact number of items. Most series do not have an item count. Count a multiple-page document, such as a bound volume, multi-page letter, or manuscript as one item. If an item count is necessary, use the conversion factor of 1,600 sheets equals one linear foot.

Extent (Memo field)

Enter the number of linear or cubic feet. Use decimals for fractions of linear or cubic feet, for example 1.4.

Type of Unit (User-built table--F5, Ctrl-F5)

Choose a unit of measure from the user-built table (F5). This is the unit of measure for the count or the extent. Use the abbreviation "LF" for linear feet and "CF" for cubic feet. Use "EA" if there is only an individual count.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Restrictions

System generated field.

It will display ‘No’ if there are no restrictions entered in the Restriction supplemental for the record. It will display ‘Yes’ if there is a Restriction supplemental for the record.

For more information on the Restriction supplemental, see Section XIX of Chapter 3, Supplemental Records.

History

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Brief Note and Expansion Note (both memo fields). In most cases, it is sufficient to use only one of these subfields - preferably, the Expansion Note - but not both. If the Expansion Note is unusually long, then it is acceptable to enter a one- or two-sentence summary in the Brief Note as well.

Enter a biographical or historical note about the creator of the series. Enter information that will help to make the nature and scope of the series clear. Use mixed case when entering data.

Note: Complete this field ONLY if it contains information that is significantly different or more detailed than the History field in the Collection level screen.

For personal papers, provide significant information about the life and activities of the person who generated the materials, including:

- dates and places of birth and death
- variant names
- education
- occupation
- significant accomplishments

For family materials, identify the members of the family and their relationships and significant biographical facts about each.

For corporate bodies, identify the structure, function, purpose, and history of the organization that created or accumulated the materials, including:

- dates of incorporation and dissolution
- location of operations
- variant names
- hierarchical location (sibling and parent organizations)
- corporate functions, activities and products
- brief administrative history

Example of historical note: Board of State Harbor Commissioners of San Francisco, 1863-1969. On April 24, 1863, the California state legislature created the Board of State Harbor Commissioners for San Francisco under the Oulton Act. The Board controlled the city's waterfront until it transferred possession to the city of San Francisco in 1969.

Example of historical note for NPS created resource management records: Identification study, 1950-1951. Conducted by John Price under Thomas Styles. Excavations from four sites within the Blue Ridge Parkway: Green Knob Spring, the Mike Green Site, the Benge Scatter, and the Sims House. The historic Sims House artifacts were collected following suspected arson of the house. The other three sites were prehistoric. Several of the artifacts from these sites were sent to Harpers Ferry Center for use in a park exhibit on material culture of the area.

Scope

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Summary Note and Expansion Note. An underline separates the entries in the two subfields on the series screen. In most cases, it is sufficient to use only one of these subfields - preferably the Expansion Note - but not both.

Enter information about the contents, nature and extent of the materials, including

- specific types and forms of material
- presence of graphics or other nontextual materials
- functions or activities resulting in the creation of the records
- most significant topics, events, persons, places represented

Use mixed case when entering data.

Example: Correspondence, notes, forms, newspapers, drawings, blueprints, diazo prints, maps, ledger sheets, and photographs relating to land acquistions made by the State of Virginia in connection with the establishment of Shenandoah National Park. Most of the materials are dated between 1927 and 1934, when most of the land acquisitions were made. Also included are tax appraisals for the period 1980-1993.

Organization/Arrangement (Orgn/Arrgn)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Organization and Arrangement. Use only one subfield or the other, but not both. Use mixed case when entering data.

Organization (memo field):

Use this subfield if the series is subdivided into subseries (or if the subseries is sub-divided into sub-subseries, etc.). List each sub-series (or sub-subseries, or sub-sub-subseries). Identify subseries with captial letters.

Example: Organized into three subseries: Subseries A, Correspondence; Subseries B, Diaries; Subseries C, Photographs.

Identify sub-subseries with Arabic numerals.

Example: Organized into three sub-subseries: Sub-subseries 1, Accounting Ledgers; Sub-subseries 2, Annual Reports; Sub-subseries 3, Monthly Reports.

Identify sub-sub-subseries with lower case letters.

Example: Organized into three sub-sub-subseries: Sub-sub-subseries a, Director's Correspondence; Sub-sub-subseries b, Contracts; Sub-sub-subseries c, Personnel Files.

Arrangement (memo field):

Use this subfield if the series (or sub-series, or sub-subseries) is not subdivided into subseries (or sub-series, or sub-sub-subseries), in order to describe the pattern in which the individual files or documents in the collection are arranged.

Example: Arranged alphabetically
Arranged chronologically
Arranged according to alpha-numeric code

In some cases, multiple levels of arrangement may be discerned.

Example: Arranged alphabetically by name of correspondent, and thereunder chronologically by date of letter.

Provenance

Memo field (F12 to expand, or right click and zoom).

Describe the origin and history of ownership for the series from the time of creation to the time of accession. Include information on successive transfers of ownership and custody of the materials. Include the date when individual items or groups of items were first brought together in their current arrangement or collation.

Example: John Smith (former owner), Jerry Bell (former owner), Barbara Stephenson (donor, 1969)

Language

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Language Note and Language Code. An underline separates the subfield entries on the series screen.

Language Note (Memo field):

Record the language(s) of the materials in the series.

Language Code (User-built stacked table -- F5, Ctrl-F5, F12):

Enter the code(s) from the OCLC-MARC Code Lists for the language(s) of the materials in the series.

Example: eng (for English)
fre (for French)
spa (for Spanish)

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Finding Aids
(Find Aids)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into seven pairs of subfields and one memo field. Each pair of subfields consists of Finding Aid and Level of Control. An underline separates the subfield entries on the series screen.

Record any existing finding aids and the level of control they provide for materials in the series. This includes finding aids developed by the creator, unit, and in the **ICMS** archives module.

Finding Aid (Memo field):

Enter a finding aid, such as a register, inventory, calendar, index, or accession list. A finding aid indicates the type of administrative and intellectual control that you have over the materials.

Level of Control (Bureau controlled table--F5):

Choose one of the entries from the table: Collection Level, Series Level, File Unit Level, Item Level. The program will pair this entry with the finding aid. The level of control indicates the degree of control that you have over the materials.

As you type, the term will complete form the authority table of acceptable terms. Press F5 or click the down arrow to view and select a term from the table.

Example: Subject Index __item level.

Box/folder list in Archives __file unit level.

Note: Enter a citation for a published guide in the Publication Citations supplemental.

You can enter up to seven pairs of finding aid/level of control.

Other (Memo field):

Enter additional information about the finding aids.

Associated Materials/Related Series (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Record information about materials related to the series from the same or closely related provenance. Related series are not reproductions, published versions, or studies based on the materials.

Enter the title of associated materials and the collection and/or series number if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: State Commission on Conservation and Development Land Records (SHEN 21203). Boundary Survey Files (II), Notices to Vacate (III), Computation Sheets for Boundary Surveys (III).

Notes

Memo field (F12 to expand, or right click and zoom).

Enter additional notes on the material.

Processed By (Proc By)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Processed By and Processing Date. An underline separates the subfield entries on the series screen.

Processed By (Memo field):

Enter the last name of the person who actually cataloged or processed the material.

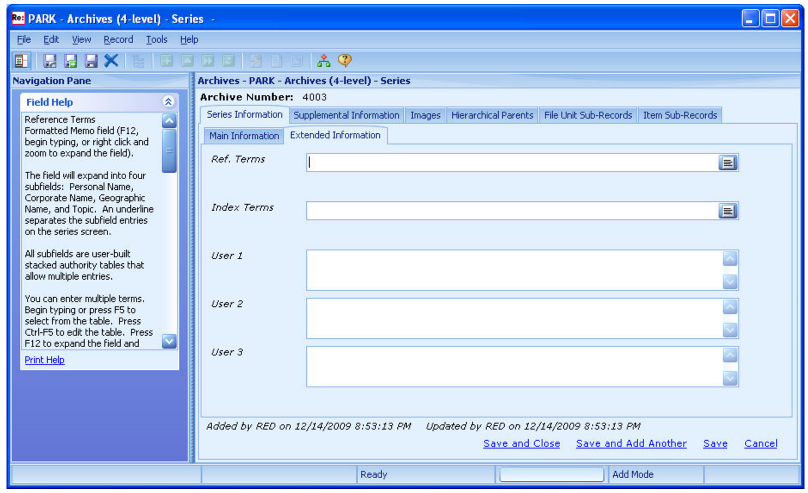
Processing Date (Straight entry field):

Enter the processing date.

You have completed the fields on the Main Information tab. To go to the next page, press Ctrl-N or click on the Extended Information tab.

14. *How do I complete the fields on the Extended Information tab?*

Follow the field-by-field instructions below for completing the fields on the Extended Information tab.



Reference Terms (Ref. Terms)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Personal Name, Corporate Name, Geographic Name, and Topic. An underline separates the subfield entries on the collection screen.

All subfields are user-built stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit. You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Personal Name:

Enter personal or family names that are subjects of the materials in the series. That is, the material is about the person or family. You can also enter names of additional creators, such as correspondents.

Enter names in inverted order, last name followed by the first name. For family names, enter the last name of the family followed by "Family."

Example: Truman, Harry S
Roosevelt Family

Corporate Name:

Enter corporate names that are subjects of the materials in the series. A corporate body has a particular name and acts as a group. Some examples of corporate bodies are government agencies, business firms, nonprofit associations, religious bodies and vessels.

Enter the name in direct order.

Example: Princeton University
Shenandoah National Park

Geographic Name:

Enter geographic place names that are subjects of the materials in the series.

Example: Independence, Missouri
Ferry Building (San Francisco, CA)

Topic:

Enter terms about the materials in the series.

Example: Land use-planning
Poets, American-20th century-Pulitzer prizes

Note: The table for reference term subfields includes a field for description. If you choose the term from an authority list, such as the Library of Congress Subject Headings, enter the authority in the description. If you use a local term, enter "Local" in the description.

Index Terms

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Form, Genre, Occupation, and Function. An underline separates the subfield entries on the series screen.

All subfields are user-built, stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Form:

Enter terms that designate the physical characteristics of the materials in the series.

Example: maps
land surveys
photoprints

Genre:

Enter terms that designate the style or technique of the intellectual contents of the materials in the series.

Example: essays
biographies
marine photographs

Occupation:

Enter the occupations reflected in the series.

Example: Novelists, American-20th century
Archeologist

Function:

Indicate the activities or functions that brought the records into being.

Example: stabilization project
land surveying

Note: The table for index term subfields includes a field for description. If you choose the term from an authority list, such as the Art & Architecture Thesaurus, enter the authority in the description. If you use a local term, enter "Local" in the description.

User 1-3

These 3 fields are user defined fields. Users with Administrator rights may define the purpose of these fields.

Right-click in the field and choose Properties from the menu to change the Label, Field Type, and User Help. In the Field Properties window, click the Modify button or select Modify This Record from the Edit menu. Click on the Default Label/Help tab. Enter a new label and select the field type.

Refer to Chapter 1, System Basics for information on field types.

F. Adding a File Unit Level Archives Record

Remember: A file unit is not the same thing as a file folder. A file on a particular subject may get so large that it is necessary to divide it into 2 or 3 file folders – but they are all part of the same file unit.

15. *How do I add a file unit record?*

There are four ways to add a file unit record:

- From the Series (subseries, sub-subseries, etc.) record, if you want the file unit record associated directly with a Series (subseries, sub-subseries, etc.), *or*

- From the Collection record, if you want the file unit record associated only with the Collection record, *or*

- From the File Unit level screen, *or*

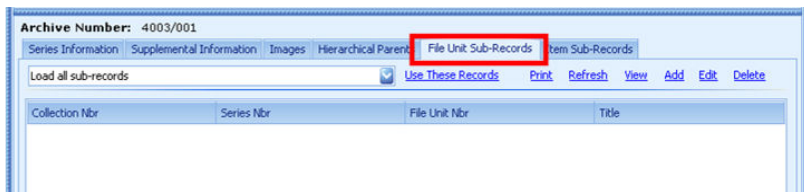
- From the Hierarchical Browse view. See Section J below for information on using the Hierarchical Browse view.

16. *How do I add a file unit record from a collection record or series record?*

To add a file unit record from a collection record or series record:

- Go to the Collection or Series record to which you want to associate a file unit record.

- Click on the File Unit Sub-Records tab.



Note: If other file unit records are already associated with the current collection or series record, you will see these in the list.

- To add a new file unit record, click the <u>Add</u> link in the upper right of this screen.

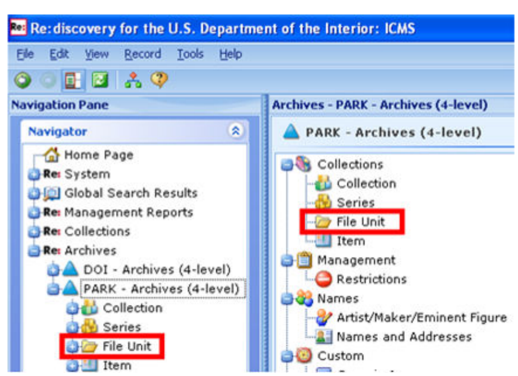
A new window will open in Add Mode displaying the screen for a File Unit level record. Follow the field-by-field instructions below for completing the information.

17. *How do I add a file unit record from the File Unit Level screen?*

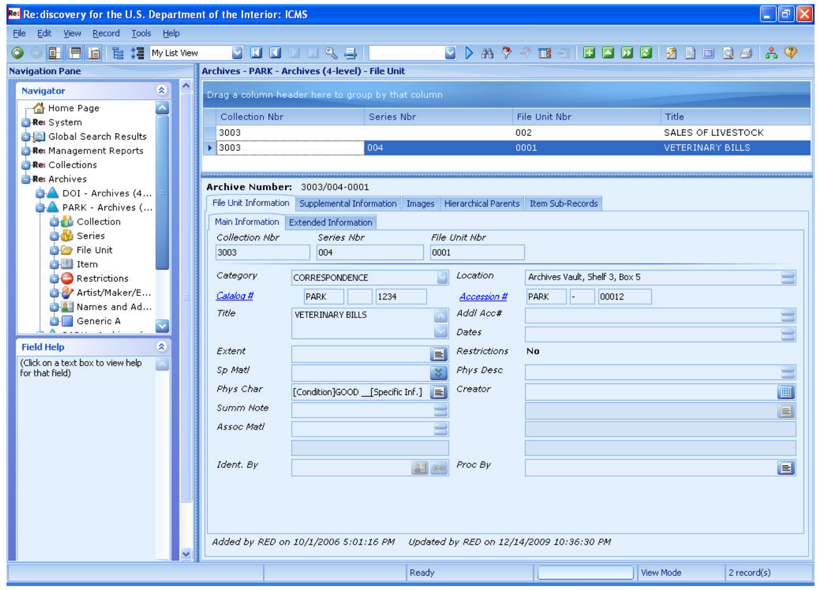
To add a file unit record from the File Unit Level screen:

- From the Navigation Pane on the left, expand the 4-level directory by clicking the + in front of the directory name and select File Unit, *or*

- From the Directory page on the right, double click the File Unit option under Collections.



The file unit level will open showing the file unit records available in the List Pane and the first file unit record in the Record Pane.

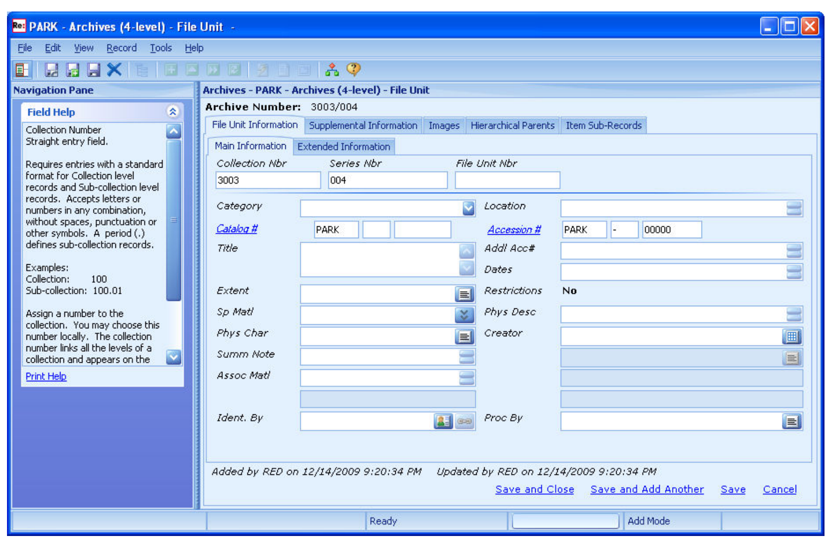


- Click the Add button, select Add New Record from the Edit menu, or press F9 to add a new record.

A new window will open in Add Mode displaying the screen for a File Unit level record. Follow the field-by-field instructions below for completing the information.

18. *How do I complete the fields on the File Unit Level Main Information tab?*

Follow the field-by-field instructions below for completing the information on the file unit record. Field help for each field is also available in the Navigation Pane on the right.



Some fields on the File Unit record are controlled by the category you select in the Category field. There are 5 basic category screens:

- Record
- Architectural
- Photograph

- Cartographic
- Moving Images

See the Category field below for a further definition of these screens.

Each of these category screens has fields in common with other categories and fields that change to suit the purpose of the category. The fields that all categories have in common are listed first. The variable fields are grouped by category after the common fields.

File Unit Common Fields:

Collection Number (Collection Nbr)

Straight entry field.

Requires entries with a standard format for Collection level records and Subcollection level records. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols. A period (.) defines subcollection records.

The collection number will autofill from the collection or series record you were on if you add a file unit record from the File Unit Sub-Records tab. If you add a File Unit record directly from the File Unit Level, the collection number will autofill from the file unit record you were viewing prior to adding a record.

Examples: Collection: 100
Subcollection: 100.01

Assign a number to the collection. You may choose this number locally. The collection number links all the levels of a collection and appears on the screen for all records in the collection. The collection number is not the same as the catalog number.

Series Number (Series Nbr)

Straight entry field.

Requires entries with a standard format for Series level or Subseries level records. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols. A period (.) defines subcollection or subseries records.

The series number will autofill from the series record you were on if you add a file unit record from the File Unit Sub-Records tab. If you add a File Unit record directly from the File Unit Level, the series number will autofill from the file unit record you were viewing prior to adding a record.

Examples: Collection 1001, Series 001
Collection 1001, Subseries 001.001
Collection 1001, Sub-subseries 001.001.001
Collection 1001, Sub-sub-subseries 001.001.001.001
Subcollection 1001.01, Series 001
Subcollection 1001.01, Subseries 001.001

Assign a number to the series, subseries, etc. You may choose this number locally.

Note: Series, subseries, sub-subseries, etc., are natural groups of documents arranged and maintained as units within a collection. The materials in a series possess a shared creation, receipt, format, or function. In general, a series or subseries is a related group of materials composed of many folders or boxes. Different series tend to have different alphabetical, chronological, or numerical filing schemes.

File Unit Number (File Unit Nbr)

Straight entry field. **You must complete this field to save the record.**

Requires a standard format. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols

Example: 0001

Assign a number to the file unit. You may choose this number locally.

A file unit is an organized unit (folder, volume, etc.) of documents grouped together either for current use or in the process of archival arrangement. It describes a grouping of materials.

Category

User-built table (F5, Ctrl-F5)

Enter the type of file unit. This is the general material designation.

The category field controls several fields on the file unit screen depending on the category you choose:

- The record screen format will appear for the following item types: manuscript, diary, logbook, scrapbook, correspondence, and document.
- The architectural record screen format will appear for architectural drawing and architectural photograph.
- The photograph screen format will appear for photograph and slide.
- The cartographic screen format will appear for map and aerial photograph.
- The moving images screen format will appear for motion picture, moving images and video recording.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Note: When creating a new category entry in the table, the Description field in the authority table must contain the screen type that will be used for the category. Use the other examples already available in the table for guidance. E.g., FORM=RECORD, FORM=PHOTOGRAPH, etc. These must be entered in all caps in the table description.

Location

Memo field (F12 to expand, or right click and zoom).
History tracking field that links to the Location supplemental record.

Enter the physical storage location of the file unit, starting with the most general location. For example, enter the building number or name, the room number, the cabinet number, and the shelf number.

For collections stored outside the park, enter the name of the institution where the collections are located, such as SEAC or University of Texas.

Develop standardized terms and abbreviations for storage areas and use these consistently. Enter locations from general to specific. Separate entries with a space.

A list of recommended abbreviations:

HS	Historic Structure
BLDG	Building
RM	Room
CAB	Cabinet
FCAB	File Cabinet
FCDR	File Cabinet Drawer
MC	Map Case
C	Case
SEC	Section
SH	Shelf
R	Rack
BX	Box
DR	Drawer
U	Unit

Example: HS 1 RM 101 SH 5
BLDG 18 RM 1 U 13

The program allows you to track changes in location. If you modify a location, the program will include the Location supplemental in the Track Changes window when you save the record. A history of location changes appears in the Location supplemental record.

Catalog Number (Catalog #)

For NPS, this is a 3-part 12-character field.
For DOI, this is a regular, 20-character straight entry field.

Enter the catalog number for the collection to which the file unit belongs.

Note: For each catalog number you must complete a catalog record in the collection management module.

The catalog number links the collection record to the catalog record in the collections management module. Click on the Catalog # link on the screen to go to the catalog record.

Accession Number (Accession #)

For NPS, this is a 3-part 10-character field.
For DOI, this is a regular, 20-character straight entry field.

Enter the earliest accession number for the collection to which the file unit belongs.

Note: For each accession number you must complete an accession record in the accession database. Click the Accession # link on the screen to go to the accession record.

Additional Accession Numbers (Addl Acc#)

Memo field (F12 to expand, or right click and zoom).

An archival collection may be composed of many accessions, as long as the accessions have the same provenance. Enter the additional accession numbers associated with the collection to which the file unit belongs. Use the same format for accession numbers that you did in the Accession # field above.

Examples: EDIS-00001
IACB 1999.04

Title

Memo field (F12 to expand, or right click and zoom).

Enter data in capital letters.

Record the name of the file unit as named by the creator, such as a folder heading. If the file unit does not have a title, create a title based on the contents and the types of records.

If the files are arranged according to a coding scheme - such as a numerical code, an alphabetical code, an alpha-numerical code, or a chronological code - include each file's code number in the title field.

Examples: GENERAL ADMINISTRATIVE CORRESPONDENCE, 1954-1958

FY 79-5234

WASHINGTON, GEORGE

Dates

Memo field (F12 to expand, or right click and zoom).

Record the inclusive dates of the file unit. If there is an exact date for the unit, enter it as month, day, year. If the date is approximate, use "circa," followed by a blank space.

Examples: 10/09/1991
1960-1962
circa 1910

Extent

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon to expand the field.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

The field will expand into three subfields: Count, Extent, and Type of Unit. An underline separates the subfield entries on the file unit screen.

Count (Straight entry)

Enter the number of items in the file unit, if you know the exact number of items. Most file unit records do not have an item count. Count a multiple-page document, such as a bound volume, multi-page letter, or manuscript as one item. If an item count is necessary, use the conversion factor of 1,600 sheets equals one linear foot.

Extent (Memo field)

Enter the number of linear or cubic feet. Use decimals for fractions of linear or cubic feet, for example 1.4.

Type of Unit (User-built table--F5, Ctrl-F5)

Choose a unit of measure from the User-built authority table. This is the unit of measure for the count or the extent. Use the abbreviation "LF" for linear feet and "CF" for cubic feet. Use "EA" if there is only an individual count.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Restrictions

System generated field.

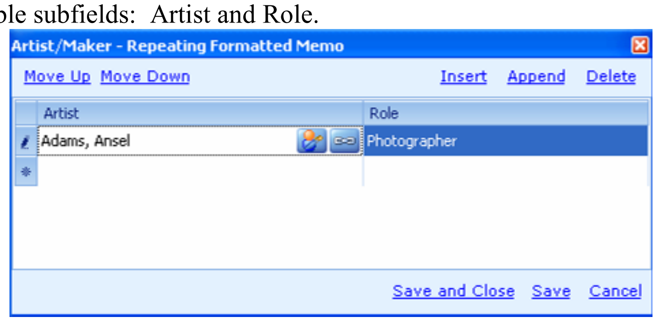
It will display 'No' if there are no restrictions entered in the Restriction supplemental for the record. It will display 'Yes' if there is a Restriction supplemental for the record.

For more information on the Restriction supplemental, see Section XIX of Chapter 3, Supplemental Records.

Creator

Repeating Formatted Memo field (F12, begin typing, right click and zoom or click the chart icon to expand the field.)

The Artist/Maker – Repeating formatted memo screen appears with two repeatable subfields: Artist and Role.



Use this field to record the creator of the archival file unit. For people, enter the last name, first name and middle initial.

Note: The records creator is the person or organization that created the entire collection, regardless of who may have authored individual documents. For example, Thomas Edison would be regarded as the creator of the Thomas Edison Papers in their entirety -- even the letters that he would have received from Harvey Firestone, Henry Ford, or other individuals. Firestone and Ford would have been the authors of the letters sent to Edison, but, because Edison filed those letters among his own papers, Edison is the creator of the records. In archives, the records creator is not necessarily synonymous with the author or artist.

If you wish to list the names of individual letter writers, photographers, or other authors or artists, you should do so in the Description field (for the collection level) or the Summary Note field (for the file unit and item levels), and not in the Creator field.

Artist (User-built table -- F5, Ctrl-F5). Linked to the Artist/Maker/Eminent Figure associated module.

For archival/manuscript collections, enter the name of the person, family, or corporate body chiefly responsible for creating or assembling the collection. Refer to Section II of Chapter 2, for further information.

As you type, the name will complete from an authority table of names in the Artist/Maker associated module. You can also press F5 or click the artist icon to view and select names from the table.

To add an artist/maker to the table, right-click in the Artist field and choose Browse Authority Table or press Ctrl-F5. Click Add to add a new entry. The Artist/Maker/Eminent Figure screen allows you to enter information such as birth and death years, accomplishments, and nationality. The entry you add will appear in the table.

Refer to Section XI of Chapter 4 for information on the Artist/Maker/Eminent Figure associated module.

The entry from the table will appear on the Artist/Maker expanded screen. Click Save and Close to add the entry to the field on the main screen.

Note: The link icon next to the artist icon allows you to view the artist/maker record for your entry.

Role (User-built table -- F5, Ctrl-F5):

Add information such as "attributed" or "author".

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

You can enter multiple rows. Press the down arrow key, or click Insert or Append, to enter additional creators for this record. Click Save to save and return to the main window. Multiple terms are separated by an underline (__). Rows are separated by double bars (||).

Identified By
(Ident. By)

User-built table (F5, Ctrl-F5). Links to Names and Addresses database.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the name of the person who identified the file unit and/or who was consulted to create the entry.

Example: Jones, Sarah

As you type, the word will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon to view and select names from the table, or press F12 for an expanded field that allows you to enter multiple terms from the table.

Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

You can also reach the Names and Addresses database from the Navigation Pane under the Archives directory node.

Note: Enter the sources that were used to create the entry in the supplemental record for Source Citation.

Processed By
(Proc By)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.
The field will expand into two subfields: Processed By and Processing Date. An underline separates the subfield entries on the file unit screen.

Processed By (Memo field):

Enter the last name of the person who actually cataloged or processed the material.

Processing Date (Straight entry field):

Enter the processing date.

Category Controlled Fields (listed by Category):

Note: The table entries in the Category field (F5, Ctrl-F5) contain more than one term per category. The description column in the table indicates the category to which a specific term belongs. For example, ‘correspondence’ is in the Record category (FORM=RECORD).

The Record category is the default category. This category can be used for all types of records. Use of specific screens for Architectural records, Photographs, Cartographic records, and moving images is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

RECORD category: Item types: manuscript, diary, logbook, scrapbook, correspondence, and document. (FORM=RECORD)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the material contents of the file unit, such as correspondence, letters or diaries.

Examples land surveys
certificates

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.
Click Delete or press Ctrl-Delete to remove unwanted entries.

Note: The *Art & Architecture Thesaurus* is a recommended source for entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right-click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Describe the file unit's physical attributes and the process of creation. That is, describe the physical nature of the material in the file unit and the relationship between the combination of technique, medium, and support (see definitions below). Note other physical attributes, such as color, irregularities, overlays, or secondary supports. Record the existence and location of signatures, markings, and inscriptions.

Example: "These records are in pen on paper with corrections in red ink."
"Studio stamp, lower right corner."

Technique - the instrument(s) with which the medium was applied or manipulated (such as pen, pencil, crayon, metalpoint) and the method(s) used to apply the media to a support, including reproductive processes and techniques by which an image is transferred from one support to another (such as drawing, engraving, stenciling).

Medium - the materials applied to a support to form images (such as chalk, ink, paint).

Support - the material to which media has been applied to make images (such as laid paper), including the substance or composition of the material (such as linen) and its function (such as graph paper).

Physical Characteristics (Phys Char)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Condition and Specific Information on Condition. An underline separates the entries in the two subfields on the collection screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5):

Choose an entry from the table to record the overall condition of the file unit. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field):

Describe the condition of the file unit. For example, make note of deterioration, tears, foxing, decomposition and shrinkage at the file unit level. Note if the material requires conservation or would be difficult to reproduce. Include the date of inspection.

Summary Note (Summ Note)

Memo field (F12 to expand, or right-click and zoom).

Enter data using mixed case letters.

Describe the contents of the file unit.

Example: Letters from Lilian Steichen Sandburg to Carl Sandburg describing the automobile trip from Michigan to North Carolina to look for a new home.

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right-click and zoom)

Record information about materials associated with the file unit from the same or closely related provenance. Related materials are not references, reproductions, published versions, or studies based on the materials.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.
Example: Pacific Coast Engineering Co. Specifications, general correspondence files, 1937-1944. Located at Oakland Public Library, Special Collections Department.

ARCHITECTURAL category:

Item types: Architectural Drawing, Architectural Photograph (FORM=ARCHITECTURAL)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon authority table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the physical form or method of production describing the architectural records, such as albums, sketch books, or drawings. Enter the function, purpose or use for which the records in the file unit were made, such as patternbooks, bidding documents, or specifications.

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Describe the item's physical attributes and the process of creation. That is, describe the physical nature of the material in the file unit and the relationship between the combination of technique, medium and support. Note other physical attributes, such as color, irregularities, overlays, or secondary supports. Record the existence and location of signatures, markings, and inscriptions.
Examples: Most of the 94 sheets are in pen on linen with corrections in red pencil.
Signed and dated in pencil on verso.

Physical Characteristics (Phys Char)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into seven subfields: Condition, Specific Information on Condition, Dimensions, Scale, Technique, Medium, and Support. An underline separates the entries in the subfields on the file unit screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5):

Choose an entry from the table to record the overall condition of the file unit. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field):

Describe the condition of the file unit. For example, make note of deterioration, tears, foxing, decomposition and shrinkage at the file unit level. Note if the file unit requires conservation or would be difficult to reproduce. Include the date of inspection.

The subfields for technique, medium and support are user-built stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Dimensions (Memo field):

Record the dimensions of the material in the file unit. Enter length, width, depth, and unit of measure.

Example: L 12, W 24, D 2"

Scale (Memo field):

Record the scale of the material in the file unit. If there is no scale, enter "no scale." The scale indicates the ratio of two units of measurement. It relates the size of the subject depicted to the size of the proposed or actual built work. Include the type of scale, unit of measurement, location on the support, and medium. Common types of scale are bar scale, numeric scale, converted scale, reconstructed scale, dimetric scale, and trimetric scale. Include comments, conversions, and clarification in the description, but place them in brackets.
Example: scale [in pieds]: 1 ft = just under 13/16 in.

Technique (User-built stacked table -- F5, Ctrl-F5, F12):

Record the instrument(s) with which the medium was applied or manipulated, such as pen, pencil, crayon, metalpoint. Record the method(s) used to apply the media to a support, such as drawing, stenciling, tracing. Include reproductive processes and techniques by which an image is transferred from one support to another, such as engraving, drypoint, pouncing.

Medium (User-built stacked table -- F5, Ctrl-F5, F12):

Record the materials applied to a support to form images, such as chalk, ink, paint.

Support (User-built stacked table -- F5, Ctrl-F5, F12):

Record the material to which media has been applied to make images, such as laid paper. Include the substance or composition of the material, such as linen. Include the form of the material, such as bristol board, and its function, such as graph paper.

Note: Use the AAT, to draw on terms from the Materials Hierarchy (MT).

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.

Describe the contents of the file unit. Note the content of markings/ inscriptions and the language.

Example: Drawings by Henry Cobb for a project undertaken by the architectural firm of I.M. Pei and Partners. [The note would continue to describe the drawings.]

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Record information about materials directly associated with the file unit from the same or closely related provenance. Especially describe items, such as photographs and textual records, separated or removed to other storage or repositories. Related items are not references, reproductions, published versions, or studies based on the materials.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: Pacific Coast Engineering Co. Specifications, general correspondence files, 1937-1944. Located at Oakland Public Library, Special Collections Department.

Purpose

User-built table (F5, Ctrl-F5)

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

This field classifies architectural records into broad types according to their original intended function. Choose one of the following three entries from the table.

- Design and Construction Documents - These documents were made for a project or built work, during the design and/or construction phase. Examples of types of design and construction documents include contract drawings, design drawings, and shop drawings.

- Record Documents - These documents were made to record what has already been built. Such documents record the appearance of built works after they ere constructed. Examples of types of record documents include topographical views, measured drawings, record drawings, as-built drawings, and reconstructions.

- Undetermined - Choose this entry if you cannot classify the architectural record as either a design and construction document or a record document.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Method of Representation/Point of View (MOR/POV)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field to expand it.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

The field will expand into two subfields: Method of Representation, and Point of View. An underline separates the subfield entries on the file unit screen. The subfields are user-built stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Method of Representation:

Record the established convention or projective technique used to make an image, such as a section or elevation.

Point of View:

Indicate the position of a real or imaginary viewer relative to the subject depicted, such as bird's-eye perspective.

Note: Method of Representation and Point of View are so closely related as to be often indistinguishable. The *Art & Architecture Thesaurus* is a recommended source for entries.

Example: Profile, section, half elevation, block plan, planting plan, piling plan, reflected ceiling plan

PHOTOGRAPH category: Item types: Photograph, Slide, Negative (FORM=PHOTOGRAPH)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon authority table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the specific type of material in the file unit, such as albumen prints, silver gelatin prints.

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Describe the file unit's physical attributes and the process of creation. That is, describe the physical nature of the material in the file unit and the relationship between the combination of technique, medium, and support (see definitions below). Note other physical attributes, such as irregularities, overlays, or secondary supports. Record primary inscriptions/markings, such as studio stamps, that appear on all the photographs in the file unit.

Example: "Studio stamp, lower right corner."

Technique - the instrument(s) with which the medium was applied or manipulated (such as pen, pencil, crayon, metalpoint) and the method(s) used to apply the media to a support, including reproductive processes and techniques by which an image is transferred from one support to another (such as drawing, engraving, stenciling).

Medium - the materials applied to a support to form images (such as chalk, ink, paint).

Support - the material to which media has been applied to make images (such as laid paper), including the substance or composition of the material (such as linen) and its function (such as graph paper).

Physical Characteristics (Phys Char)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into six subfields: Condition, Specific Information on Condition, Support, Emulsion, Color, and Dimensions. An underline separates the entries in the subfields on the file unit screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5):

Choose an entry from the table to record the overall condition of the file unit. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field):

Describe the condition of the file unit. For example, make note of deterioration, tears, foxing, decomposition and shrinkage at the file unit level. Note if the material requires conservation or would be difficult to reproduce. Include the date of inspection. Note if the material is cellulose nitrate that has deteriorated to the point where it must be destroyed.

Support (Memo field):

Record if the file unit contains any cellulose nitrate or cellulose acetate film.

Emulsion (Memo field):

Record the emulsion, such as negative, positive, of the materials in the file unit.

Color (Memo field):

Record the color, such as black and white, tinted, color, of the materials in the file unit.

Dimensions (Memo field):

Record the dimensions of the materials in the file unit.

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.

Describe primary subjects of the group of images contained in the file unit.

Examples: "Interior views of the SS President Cleveland"
"Damage to vessels; the SS President Cleveland in drydock showing damage to bow from collision."

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Describe all records directly associated with the file unit. This could be photographs directly associated with reports, field notes, and newspaper articles. It could also be any material for which photographs were expressly produced to provide documentary support and evidence. Especially describe material, such as related images and textual records, separated or removed to other storage or repositories.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: California. Department of Finance. (Links Collection). Historical record photographs. (F3254:1-307). Located at California State Archives.

Note: Related items are not references, reproductions, published versions, or studies based on the materials. Enter references in the supplemental record for source citation. Enter publications in the supplemental record for publications.

CARTOGRAPHIC category:

Item types: Aerial photograph, cartographic, map (FORM=CARTOGRAPHIC)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon authority table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the specific type of material in the file unit, such as dot grids, vertical stereograms, hand-drawn maps. Enter the function, purpose or use for which the maps were made, such as base maps, stratification maps, vegetation thematic maps.

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Describe the file unit's physical attributes and the process of creation. That is, describe the physical nature of the material in the file unit and the relationship between the combination of technique, medium, and support (see definitions below). Note other physical attributes, such as irregularities, color, overlays, or secondary supports. Record primary inscriptions/ markings, such as maker's stamps, that appear on all the maps in the file unit.

Examples: "Hand-colored; watercolors on bristol board."
"Maker's stamp, lower right corner."

"Graphite on linen."

Technique - the instrument(s) with which the medium was applied or manipulated (such as pen, pencil, crayon, metalpoint) and the method(s) used to apply the media to a support, including reproductive processes and techniques by which an image is transferred from one support to another (such as drawing, engraving, stenciling).

Medium - the materials applied to a support to form images (such as chalk, ink, paint).

Support - the material to which media has been applied to make images (such as laid paper), including the substance or composition of the material (such as linen) and its function (such as graph paper).

Physical Characteristics (Phys Char)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Condition, Specific Information on Condition, Format/Medium, and Projection. An underline separates the entries in the subfields on the file unit screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5):

Choose an entry from the table to record the overall condition of the file unit. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field):

Describe the condition of the file unit. For example, make note of deterioration, tears, foxing, decomposition and shrinkage at the file unit level. Note if the material requires conservation or would be difficult to reproduce. Include the date of inspection.

Format/Medium and Projection are both user built stacked table fields.
As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Format/Medium (User-built stacked table -- F5, Ctrl-F5, F12)

Record the material on which the maps are printed, such as mylar, vellum. Record the media used to produce the maps, such as ink, graphite, paint.

Examples ink on paper
graphite on linen

Projection (User-built stacked table -- F5, Ctrl-F5, F12)

Record the established convention or projective technique used to make the map, such as a section or elevation.

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.

Describe the primary contents of the maps contained in the file unit.

Examples: Location of subsurface testing areas at various sites within Minute Man National Historical Park.
Topographic maps of the Appalachian Mountains.

Map Source

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Denver Service Center Number (DSC#) and Map Source. An underline separates the subfield entries on the file unit screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

DSC# (Straight entry field):

Record the DSC# for maps that are part of NPS publications.

Map Source (Memo field):

Record the name of the publisher and/or source(s) of the information detailed on the maps. Include the city, country, and date of publication.
Example: Rand McNally & Company, Chicago, Illinois, 1992.

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Describe all records directly associated with the file unit. Maps are frequently associated with material such as reports, field notes, construction documents, and specifications. Especially describe items, such as related maps and textual records, separated or removed to other storage or repositories.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: Bureau of Parks and Recreation. Parks Division Blueprints and Sketches (#127), Construction Files (#89), Park Maintenance Files (#129). Located at New York State Archives.

Note: Related items are not references, reproductions, published versions, or studies based on the materials. Enter references in the supplemental record for source citation. Enter publications in the supplemental record for publications.

MOVING IMAGES category:

Item types: Motion picture, Moving images, Video recording (FORM=MOVING IMAGES)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon authority table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the specific type of material in the file unit, such as film reels, videocassettes, laser videodiscs, digital video discs.

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Describe the file unit's physical attributes and the process of creation. That is, describe the physical nature of the material in the file unit and the relationship between the combination of technique, medium, and support (see definitions below). Note other physical attributes, such as irregularities, color, overlays, or secondary supports. Record primary inscriptions/ markings, such as studio stamps, that appear on all the photographs in the file unit.

Example: "Studio stamp, lower right corner."

Technique - the instrument(s) with which the medium was applied or manipulated (such as pen, pencil, crayon, metalpoint) and the method(s) used to apply the media to a support, including reproductive processes and techniques by which an image is transferred from one support to another (such as drawing, engraving, stenciling).

Medium - the materials applied to a support to form images (such as chalk, ink, paint).

Support - the material to which media has been applied to make images (such as laid paper), including the substance or composition of the material (such as linen) and its function (such as graph paper).

Physical Characteristics (Phys Char)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into nine subfields: Condition, Specific Information on Condition, Description, Color, Sound, Emulsion, Film Base, Length, and Other. An underline separates the entries in the subfields on the file unit screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5):

Choose an entry from the table to record the overall condition of the file unit. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field):

Describe the condition of the file unit. For example, make note of deterioration, wear and tear, and chemical decomposition. Note if the material is projectable. Include the date of inspection.

Description (Memo field):

Describe the physical nature of the item and the relationship or combination of technique, medium, and support. Record other physical attributes, such as irregularities.

The subfields for color, sound, emulsion, film base and length are user-built, stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Color (User-built stacked table -- F5, Ctrl-F5, F12):

Record the color of the films in the file unit, such as black and white or a specific color system.

Example: technicolor

Sound (User-built stacked table -- F5, Ctrl-F5, F12):

Enter the various sound systems for the films in the file unit.

Example: Optical: variable density
Magnetic: four-channel

Emulsion (User-built stacked table -- F5, Ctrl-F5, F12):

Record the emulsion for the films in the file unit, such as negative, positive.

Film Base (User-built stacked table -- F5, Ctrl-F5, F12):

Include the substance or composition of the film base for the films in the file unit.

Example: nitrate
diacetate
polyester

Note: Use the *AAT*, to draw on terms from the Materials Hierarchy (MT).

Length (User-built stacked table -- F5, Ctrl-F5, F12):

Enter the length in feet and/or the playing time of the films in the file unit.

Example: 29 min.

Other (memo):

Record other physical characteristics, such as the aspect ratio, projection speed, manufacture of film stock, and processing laboratory.

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.
Describe primary subjects of the films contained in the file unit.

Example: Films that document the voyage operations of North Star III, a U.S.M.S. ship that supplies the native groups of Alaska. The films focus on itinerary destinations, types of cargo, loading and unloading operations, ship's equipment, navigation procedures, and natural hazards.

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Describe all records directly associated with the file unit. These could include textual records concerning the various facets of the production. Especially describe material that has been separated or removed to other storage or repositories.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: Video recordings of Civil War Sites Commission Meeting and Ceremonies, April 17, 1991-July 12, 1993. (NN3-220-94-002). Motion Picture, Sound, and Video Branch. National Archives and Records Administration.

Note: Related items are not references, reproductions, published versions, or studies based on the materials. Enter references in the supplemental record for source citation. Enter publications in the supplemental record for publications.

Dimensions

User-built stacked table (F5, Ctrl-F5, F12)

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Record the dimensions of each film, video, or other moving image format that is part of the file unit.

Example: 16mm
35mm

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Language

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

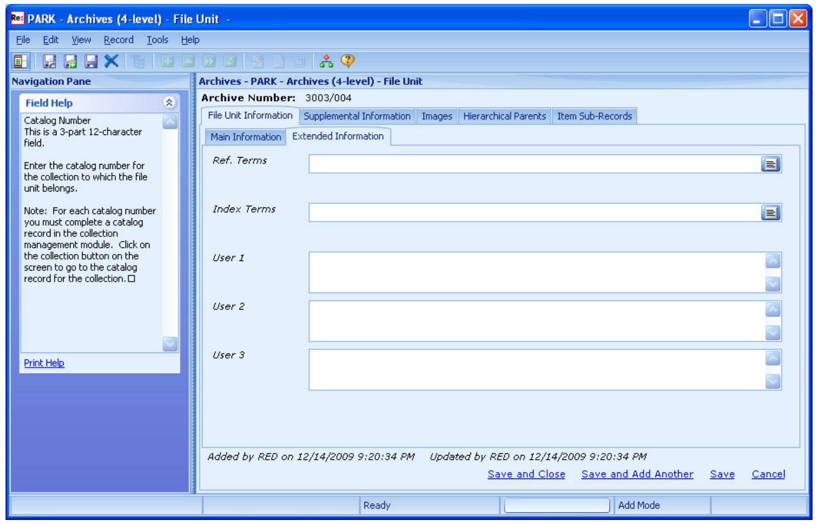
Record the language of the films in the file unit.

Example: Navajo with English subtitles

You have completed the fields on the Main Information tab. To go to the next page, press Ctrl-N or click on the Extended Information tab.

19. *How do I complete the fields on the Extended Information tab?*

Follow the field-by-field instructions below for completing the fields on the Extended Information tab.



The first two fields (Reference Terms and Index Terms) are constant for all categories. The remaining fields may be user fields or variable fields depending on the category entered on the Main Information tab.

Reference Terms (Ref. Terms)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Personal Name, Corporate Name, Geographic Name, and Topic. An underline separates the subfield entries on the collection screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

All subfields are user-built stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Personal Name:

Enter personal or family names that are subjects of the materials in the file unit. That is, the material is about the person or family. You can also enter names of additional creators, such as correspondents.

Enter names in inverted order, last name followed by the first name. For family names, enter the last name of the family followed by "Family."

Example: Sjoberg, J.G.
Cook Family

Corporate Name:

Enter corporate names that are subjects of the materials in the file unit. A corporate body has a particular name and acts as a group. Some examples of corporate bodies are government agencies, business firms, nonprofit associations, religious bodies and vessels.

Enter the name in direct order.

Examples: Pacific Coast Engineering Company
I.M. Pei and Partners

Geographic Name:

Enter geographic place names that are subjects of the materials in the file unit.

Example: Oakland (Calif.)
Central Park (New York)
Sonoran Desert

Topic:

Enter terms about the subjects of the file unit.

Example: shipbuilding
beach terraces
structure
sea-walls, California, San Francisco

Note: The table for reference term subfields includes a field for description. If you choose the term from an authority list, such as the Library of Congress Subject Headings, enter the authority in the description. If you use a local term, enter "Local" in the description.

Index Terms

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Form, Genre, Occupation, and Function. An underline separates the subfield entries on the file unit screen. Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

All subfields are user-built, stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.
Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Form:

Enter terms that designate the physical characteristics of the materials in the file unit.

Examples: maps
glass plate negative
daybooks

Genre:

Enter terms that designate the style or technique of the intellectual contents of the materials in the file unit.

Example: essays
progress photographs
marine photographs

Occupation:

Enter the occupations reflected in the file unit.

Examples: Novelists, American-20th century
Archeologist
shipmaster

Function:

Indicate the activities or functions that brought the records into being.

Examples: stabilization project
land surveying
oral history project
Section 106 compliance

Note: The table for index term subfields includes a field for description. If you choose the term from an authority list, such as the Art & Architecture

Thesaurus, enter the authority in the description. If you use a local term, enter "Local" in the description.

Additional Numbers
(Addl Numbers)
(ARCHITECTURAL category)

Formatted Memo field (F12, begin typing, or right click and zoom to expand the field).

The field will expand into two subfields: NPS DSC Number, and Other Numbers.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

NPS DSC Number (Memo field):

Enter any National Park Service Denver Service Center numbers associated with the file unit.

Other Numbers (Memo field):

Enter any other numbers associated with the file unit.

Captions
(PHOTOGRAPH category)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Record any primary captions accompanying the photographs. Published photographs usually have captions. Include the name and date of the publications, if known, in the supplemental record for publications.

Example: "Pennsylvania Dutch. Earthenware dish covered with slip and incised to represent a peacock and foliage. Signed and dated 1793. Metropolitan Museum of Art, New York."

Captions
(CARTOGRAPHIC category)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Record any primary captions accompanying the maps. Published maps usually have captions. Include the name and date of the publications, if known, in the supplemental record for publications.

Example: "An orthophotograph of New Alto In Chaco Canyon National Monument with superimposed topographic contours."
"A prehistoric agricultural field (left) portrayed on density analyzer. A modern road crosses the field."

Credits/Cast
(MOVING IMAGES category)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Director, Editor, Credits, and Cast/Talent. An underline separates the entries in the subfields on the file unit.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Director (Memo field):

Enter the name(s) of the director(s) of the films in the file unit.

Example: Leonard Kamerling and Sarah Elder

Editor (Memo field):

Enter the name(s) of the editor(s) of the films in the file unit.

Example: Ken Burns

Credits (Memo field):

Record the credits for the films in the file unit, if known. Credits may include writers, cinematographers, musicians, and costume designers.

Cast/Talent (Memo field):

List the significant cast or talent appearing in the films in the file unit, if known.

Example: Bushra Azzouz, Marlene Farnum, Nettie Jackson Kuneki

User fields

These fields are user defined fields. Users with Administrator rights may define the purpose of these fields.

Each category can use these fields with different formats. First select a record that contains the category you want to use for the User field.

Right-click in the field and choose Properties from the menu to change the Label, Field Type, and User Help. In the Field Properties window, click the Modify button or select Modify This Record from the Edit menu. Click on the Default Label/Help tab. Enter a new label and select the field type.

Refer to Chapter 1, System Basics for information on field types.

G. Adding an Item Level Archives Record

1. *How do I add an item record?*

There are five ways to add an item record:

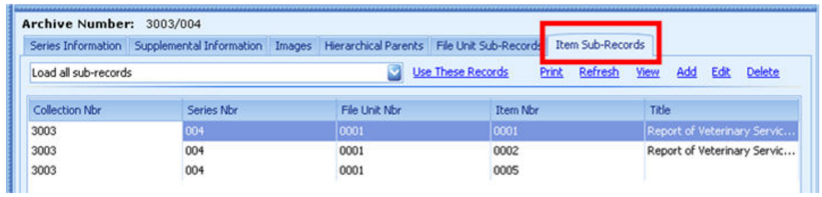
- From the File Unit record, if you want the item record associated directly with a File Unit, *or*
- From the Series record, if you want the item record associated directly with a Series, *or*
- From the Collection record, if you want the item record associated directly with the Collection record (if the Collection is not arranged in Series), *or*
- Directly from the Item level screen, *or*
- From the Hierarchical Browse view. See Section J below for information on using the Hierarchical Browse view.

2. *How do I add an item record from a collection, series or file unit record?*

To add an item record from a collection, series or file unit record:

- Go to the Collection, Series or File Unit record to which you want to associate the item record.

- Click on the Item Sub-Records tab.



Note: If other item records are already associated with the current collection, series or file unit record, you will see these in the list.

- To add a new item record, click the Add link in the upper right of this screen.

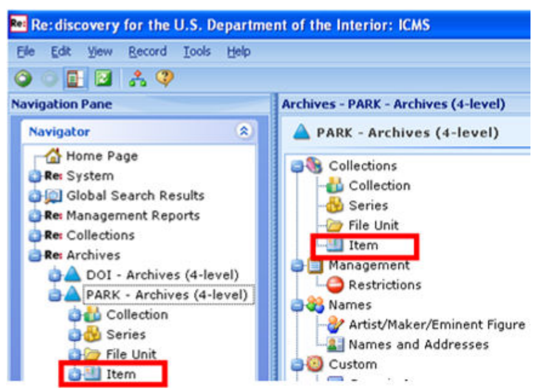
A new window will open in Add Mode displaying the screen for an Item level record. Follow the field-by-field instructions below for completing the information.

3. *How do I add an item record from the Item Level screen?*

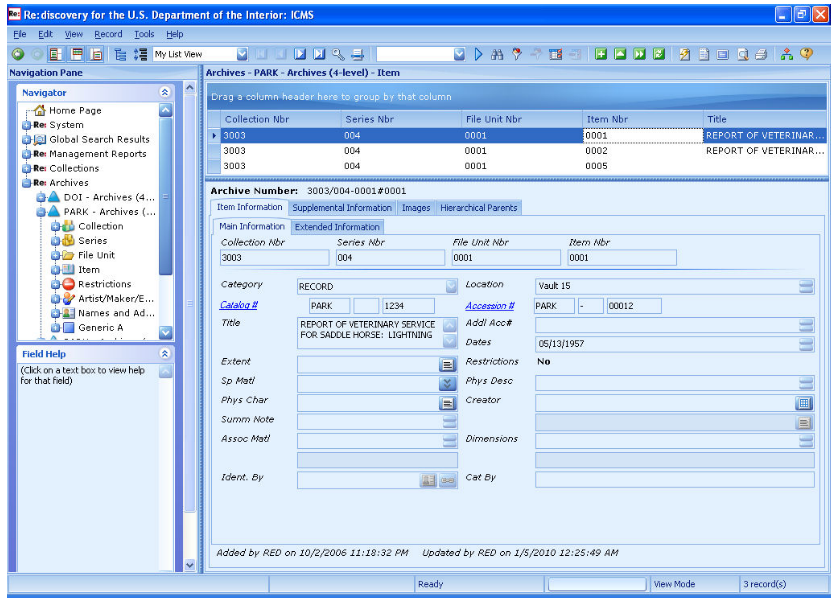
To add an item record from the Item Level screen:

- From the Navigation Pane on the left, expand the 4-level directory by clicking the + in front of the directory name and select Item, *or*

- From the Directory page on the right, double click the Item option under Collections.



The item level will open showing the item records available in the List Pane and the first item record in the Record Pane.

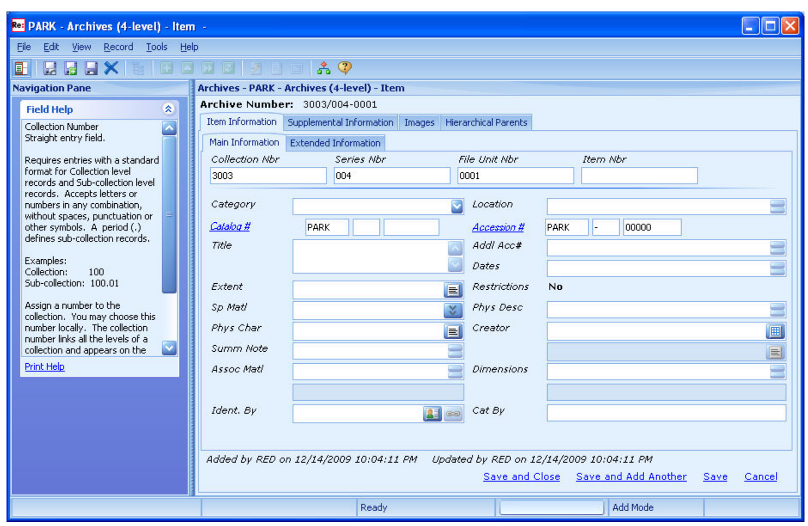


- Click the Add button, select Add New Record from the Edit menu, or press F9 to add a new record.

A new window will open in Add Mode displaying the screen for an Item level record. Follow the field-by-field instructions below for completing the information.

4. *How do I complete the fields on the Item Level Main Information tab?*

Follow the field-by-field instructions below for completing the information on the item record. Field help for each field is also available in the Navigation Pane on the right.



Some fields on the Item record are controlled by the category you select in the Category field. There are 5 basic category screens:

- Record
- Architectural
- Photograph
- Cartographic
- Moving Images

See the Category field below for further definition of these screens.

Each of these category screens has fields in common with other categories and fields that change to suit the purpose of the category. The fields that all categories have in common are listed first. The variable fields are grouped by category after the common fields.

Item Common Fields:

Collection Number (Collection Nbr)

Straight entry field.

Requires entries with a standard format for Collection level records and Subcollection level records. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols. A period (.) defines subcollection records.

The collection number will autofill from the collection, series, or file unit record you were on if you add an item record from the Item Sub-Records tab on any of these levels. If you add an Item record directly from the Item Level, the collection number will autofill from the item record you were viewing prior to adding a record.

Examples: Collection: 100
Subcollection: 100.01

Assign a number to the collection. You may choose this number locally. The collection number links all the levels of a collection and appears on the screen for all records in the collection. The collection number is not the same as the catalog number.

Series Number (Series Nbr)

Straight entry field.

Requires entries with a standard format for Series level or Subseries level records. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols. A period (.) defines subcollection or subseries records.

The series number will autofill from the series or file unit record you were on if you add an item record from the Item Sub-Records tab on these levels. If you add an Item record directly from the Item Level, the series number will autofill from the item record you were viewing prior to adding a record.

Examples: Collection 1001, Series 001
Collection 1001, Subseries 001.001
Collection 1001, Sub-subseries 001.001.001
Collection 1001, Sub-sub-subseries 001.001.001.001
Subcollection 1001.01, Series 001
Subcollection 1001.01, Subseries 001.001

Assign a number to the series, subseries, etc. You may choose this number locally.

Note: Series, subseries, sub-subseries, etc., are natural groups of documents arranged and maintained as units within a collection. The materials in a series possess a shared creation, receipt, format, or function. In general, a series or subseries is a related group of materials composed of many folders or boxes. Different series tend to have different alphabetical, chronological, or numerical filing schemes.

File Unit Number
(File Unit Nbr)

Straight entry field.

Requires a standard format. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols.

The File Unit number will autofill from the file unit record you were on if you add an item record from the Item Sub-Records tab on this level. If you add an Item record directly from the Item Level, the File Unit number will autofill from the item record you were viewing prior to adding a record.

Example: 0001

Assign a number to the file unit. You may choose this number locally.

A file unit is an organized unit (folder, volume, etc.) of documents grouped together either for current use or in the process of archival arrangement. It describes a grouping of materials.

Item Number
(Item Nbr)

Straight entry field. **You must complete this field to save the record.**

Requires a standard format. Accepts letters or numbers in any combination, without spaces, punctuation or other symbols.

Example: 0001

Assign a number to the item. You may choose this number locally.

Category

User-built table (F5, Ctrl-F5)

Enter the type of item. This is the general material designation.

The category field controls several fields on the item screen depending on the category you choose:

- The record screen format will appear for the following item types: manuscript, diary, logbook, scrapbook, correspondence, and document.
- The architectural record screen format will appear for architectural drawing and architectural photograph.
- The photograph screen format will appear for photograph and slide.
- The cartographic screen format will appear for map and aerial photograph.
- The moving images screen format will appear for motion picture, moving images and video recording.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Note: When creating a new category entry in the table, the Description field in the authority table must contain the screen type that will be used for the category. Use the other examples already available in the table for guidance. E.g., FORM=RECORD, FORM=PHOTOGRAPH, etc. These must be entered in all caps in the table description.

Location

Memo field (F12 to expand, or right click and zoom).
History tracking field that links to the Location supplemental record.

Enter the physical storage location of the file unit, starting with the most general location. For example, enter the building number or name, the room number, the cabinet number, and the shelf number.

For collections stored outside the unit, enter the name of the institution where the collections are located, such as SEAC or University of Texas.

Develop standardized terms and abbreviations for storage areas and use these consistently. Enter locations from general to specific. Separate entries with a space.

A list of recommended abbreviations:

HS	Historic Structure
BLDG	Building
RM	Room
CAB	Cabinet
FCAB	File Cabinet
FCDR	File Cabinet Drawer
MC	Map Case
C	Case
SEC	Section
SH	Shelf
R	Rack
BX	Box
DR	Drawer
U	Unit

Examples: HS 1 RM 101 SH 5
BLDG 18 RM 1 U 13

The program allows you to track changes in location. If you modify a location, the program will include the Location supplemental in the Track Changes window when you save the record. A history of location changes appears in the Location supplemental record.

Catalog Number (Catalog #)

For NPS, this is a 3-part 12-character field.
For DOI, this is a regular, 20-character straight entry field.

Enter the catalog number for the collection to which the item belongs.

Note: For each catalog number you must complete a catalog record in the collection management module.

The catalog number links the item record to the catalog record in the collections management module. Click the Catalog # link on the screen to go to the catalog record.

Instructions for entering a catalog number:

NPS Catalog Number format:

a. The first part is the four-letter park acronym, in the form of "AAAA."

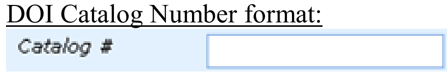
b. Leave this space blank if the park has only one museum collection.

If the park has different units that have separate accession and catalog systems, enter a museum collection designation in the form of a letter, for example, A, B, C. Only a few parks will use such a designation. The Chief Curator must approve the designation. Review requests to use a designation with the SO curator. Send requests in writing to the Chief Curator, Museum Management Program, Cultural Resources Stewardship and Partnership Programs.

c. The third part is the unique sequential number assigned to a collection, for example, 999999.

Examples: SAFR 23
COLOJ 345. The Colonial number contains a "J" as a designation for the Jamestown museum collection.

DOI Catalog Number format:



Enter a catalog number using a standard format. The first part of the catalog number should be your unit acronym.

Example: IACB 1999.04.01

Accession Number (Accession #)

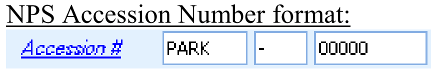
For NPS, this is a 3-part 10-character field.
For DOI, this is a regular, 20-character straight entry field.

Enter the earliest accession number for the collection to which the item belongs.

Note: The accession number links the item record to the accession database file. Click the Accession # link on the screen to go to the accession record.

Instructions for entering an accession number:

NPS Accession Number format:



a. The first part is the four-letter park acronym, in the form of "AAAA."

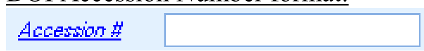
b. The second part is a hyphen, which distinguishes the accession number from the catalog number.

If the park has different units that have separate accession and catalog systems, enter a museum collection designation in the form of a letter, for example, A, B, C in place of the hyphen. Only a few parks will use such a designation. The Chief Curator must approve the designation. Review requests to use a designation with the SO curator. Send requests in writing to the Chief Curator, Museum Management Program, Cultural Resources Stewardship and Partnership Programs.

c. The third part is the 5-digit identification number assigned to an accession, for example, 99999.

Examples: EDIS-00001,
NOCAS00004. The North Cascades accession number contains an "S" to indicate a separate collection.

DOI Accession Number format:



Enter the number for the accession using a standard format. The first part of the catalog number should be your unit acronym.

Example: IACB 1999.04

Additional Accession Numbers (Addl Acc#)

Memo field (F12 to expand, or right click and zoom).

An archival collection may be composed of many accessions, as long as the accessions have the same provenance. Enter the additional accession numbers associated with the collection to which the item belongs. Use the same format for accession numbers that you did in the Accession # field above.

Examples: EDIS-00001
IACB 1999.04

Title

Memo field (F12 to expand, or right click and zoom).

Enter data in capital letters.

Record the formal title as it appears on the item. If the item does not have a formal title, enter a title that includes the form of material. For letters, provide names of writer and recipient, followed by date.

Examples: "AROUND THE CAMPFIRE" (FORMAL TITLE)
BIRTH CERTIFICATE
JONES TO SMITH, APRIL 4, 1878
MINUTES OF MEETING, JUNE 12, 1920

Dates

Memo field (F12 to expand, or right click and zoom).

Record the date of the item. If there is an exact date, enter it as month, day, year. If the date is approximate, use "circa," followed by a blank space.

Examples: 10/09/1991
1960
circa 1910

Extent

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon to expand the field.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

The field will expand into three subfields: Count, Extent, and Type of Unit. An underline separates the subfield entries on the file unit screen.

Count (Straight entry)

Enter the number of items. Count a multiple-page document, such as a bound volume, multi-page letter, or manuscript as one item.

Extent (Memo field)

Enter the number of linear or cubic feet. Use decimals for fractions of linear or cubic feet, for example 1.4. This field does not apply to most items. Leave it blank or enter "0".

Type of Unit (User-built table--F5, Ctrl-F5)

Choose a unit of measure from the User-built authority table (F5). This is the unit of measure for the count or the extent. Use the abbreviation "LF" for linear feet and "CF" for cubic feet. Use "EA" for an individual item count.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Restrictions

System generated field.

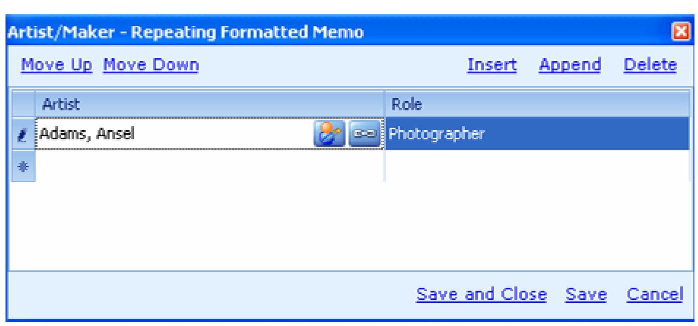
It will display 'No' if there are no restrictions entered in the Restriction supplemental for the record. It will display 'Yes' if there is a Restriction supplemental for the record.

For more information on the Restriction supplemental, see Section XIX of Chapter 3, Supplemental Records.

Creator

Repeating Formatted Memo field. Type in the field, press F12 or click the chart icon to expand the field.

The Artist/Maker – Repeating formatted memo screen appears with two repeatable subfields: Artist and Role.



Use this field to record the creator of the archival item. For people, enter the last name, first name and middle initial.

Note: The records creator is the person or organization that created the entire collection, regardless of who may have authored individual documents. For example, Thomas Edison would be regarded as the creator of the Thomas Edison Papers in their entirety -- even the letters that he would have received from Harvey Firestone, Henry Ford, or other individuals. Firestone and Ford would have been the authors of the letters sent to Edison, but, because Edison filed those letters among his own papers, Edison is the creator of the records. In archives, the records creator is not necessarily synonymous with the author or artist.

If you wish to list the names of individual letter writers, photographers, or other authors or artists, you should do so in the Description field (for the collection level) or the Summary Note field (for the file unit and item levels), and not in the Creator field.

Artist (User-built table -- F5, Ctrl-F5). Linked to the Artist/Maker/Eminent Figure associated module.

For archival/manuscript collections, enter the name of the person, family, or corporate body chiefly responsible for creating or assembling the collection. Refer to Section II of Chapter 2, for further information.

As you type, the name will complete from an authority table of names in the Artist/Maker associated module. You can also press F5 or click the artist icon to view and select names from the table.

To add an artist/maker to the table, right-click in the Artist field and choose Browse Authority Table or press Ctrl-F5. Click <u>Add</u> to add a new entry. The Artist/Maker/Eminent Figure screen allows you to enter information such as birth and death years, accomplishments, and nationality. The entry you add will appear in the table.

Refer to Section XI of Chapter 4 for information on the Artist/Maker/Eminent Figure associated module.

The entry from the table will appear on the Artist/Maker expanded screen. Click <u>Save and Close</u> to add the entry to the field on the main screen.

Note: The link icon next to the artist icon allows you to view the artist/maker record for your entry.

Role (User-built table -- F5, Ctrl-F5):

Add information such as "attributed" or "author".

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click <u>Add Term</u>. After entering the term, click <u>Save Change</u>, then click <u>Select</u> to enter the term in the field.

You can enter multiple rows. Press the down arrow key, or click <u>Insert</u> or

Append, to enter additional creators for this record. Click Save to save and return to the main window. Multiple terms are separated by an underline (__). Rows are separated by double bars (||).

Identified By
(Ident. By)

User-built table (F5, Ctrl-F5) Links to Names and Addresses database.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the name of the person who identified the item and/or who was consulted to create the entry.

Example: Jones, Sarah

As you type, the name will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon to view and select names from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash - - separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

You can also reach the Names and Addresses database from the Navigation Pane under the Archives directory node.

Note: Enter the sources that were used to create the entry in the supplemental record for Source Citation.

Cataloged By
(Cat By)

Straight entry field.

Enter the name of the person who cataloged the item.

Category Controlled Fields (listed by Category):

Note: The table entries in the Category field (F5, Ctrl-F5) contain more than one term per category. The description column in the table indicates the category to which a specific term belongs. For example, ‘correspondence’ is in the Record category (FORM=RECORD).

The Record category is the default category. This category can be used for all types of records. Use of specific screens for Architectural records, Photographs, Cartographic records, and moving images is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

RECORD category:

Item types: manuscript, diary, logbook, scrapbook, correspondence, and document. (FORM=RECORD)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the physical form; method of production; and/or the function, purpose or use for which the item was made.

Examples: letters
land surveys
certificates
drawings

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Note: The *Art & Architecture Thesaurus* is a recommended source for entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Use this field to supplement or duplicate the information in the Summary Note field.

Physical Characteristics (Phys Char)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Condition and Specific Information on Condition. An underline separates the entries in the two subfields on the collection screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5) (all categories):

Choose an entry from the table to record the overall condition of the item. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field) (all categories):

Describe the condition of the item. For example, make note of deterioration, tears, foxing, decomposition and shrinkage. Note if the material requires conservation or would be difficult to reproduce. Include the date of inspection.

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.

Briefly describe the item's contents.

Examples: "Letter from Lilian Steichen Sandburg to Carl Sandburg describing the automobile trip from Michigan to North Carolina, the weather in the mountains, and preparations for renovating the barn."

In rare cases involving exceptionally valuable or important documents, it may be appropriate to include information on the documents physical attributes (such as type of paper, color of ink, irregularities, overlays, or supports), but in general this is not recommended, and excessive detail and unnecessary description should be avoided.

Technique - the instrument(s) with which the medium was applied or manipulated (such as pen, pencil, crayon, metalpoint) and the method(s) used to apply the media to a support, including reproductive processes and techniques by which an image is transferred from one support to another (such as drawing, engraving, stenciling).

Medium - the materials applied to a support to form images (such as chalk, ink, paint).

Support - the material to which media has been applied to make images (such as laid paper), including the substance or composition of the material (such as linen) and its function (such as graph paper).

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Record information about materials associated with the item from the same or closely related provenance. Related materials are not references, reproductions, published versions, or studies based on the materials.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: Pacific Coast Engineering Co. Specifications, general correspondence files, 1937-1944. Located at Oakland Public Library, Special Collections Department.

Dimensions

Memo field (F12 to expand, or right click and zoom)

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Record the dimensions of the item.

Example: 8 1/2 X 11"

ARCHITECTURAL category:

Item types: Architectural Drawing, Architectural Photograph (FORM=ARCHITECTURAL)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the physical form or method of production describing the architectural records, such as albums, sketch books, or drawings. Enter the function, purpose or use for which the item was made, such as patternbooks, bidding documents, or specifications.

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Use this field to supplement or duplicate the information in the Summary Note field.

Physical Characteristics (Phys Char)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into seven subfields: Condition, Specific Information on Condition, Dimensions, Scale, Technique, Medium, and Support. An underline separates the entries in the subfields on the item screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5) (all categories):

Choose an entry from the table to record the overall condition of the item. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field) (all categories):

Describe the condition of the item. For example, make note of deterioration, tears, foxing, decomposition and shrinkage. Note if the item requires conservation or would be difficult to reproduce. Include the date of inspection. Note if the material is cellulose nitrate that has deteriorated to the point where it must be destroyed.

Dimensions (Memo field):

Record the dimensions of the item in height, width, depth, and unit of measure.

Example: H 12, W 24, D 2 "

Scale (Memo field):

Record the scale of the item. If there is no scale, enter "no scale." The scale indicates the ratio of two units of measurement. It relates the size of the subject depicted to the size of the proposed or actual built work. Include the type of scale, unit of measurement, location on the support, and medium. Common types of scale are bar scale, numeric scale, converted scale, reconstructed scale, dimetric scale, and trimetric scale. Include comments, conversions, and clarification in the description, but place them in brackets.

Example: scale [in pieds]: 1 ft = just under 13/16 in.

The subfields for technique, medium and support are user-built stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries. Click Delete or press Ctrl-Delete to remove unwanted entries.

Technique (User-built stacked table -- F5, Ctrl-F5, F12):

Record the instrument(s) with which the medium was applied or manipulated, such as pen, pencil, crayon, metalpoint. Record the method(s) used to apply the media to a support, such as drawing, stenciling, tracing. Include reproductive processes and techniques by which an image is transferred from one support to another, such as engraving, drypoint, pouncing.

Medium (User-built stacked table -- F5, Ctrl-F5, F12):

Record the materials applied to a support to form images, such as chalk, ink, paint.

Support (User-built stacked table -- F5, Ctrl-F5, F12):

Record the material to which media has been applied to make images, such as laid paper. Include the substance or composition of the material, such as linen. Include the form of the material, such as bristol board, and its function, such as graph paper.

Note: Use the AAT, to draw on terms from the Materials Hierarchy (MT).

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.

Describe the item's physical attributes and the process of creation. That is, describe the physical nature of the item and the relationship between the combination of technique, medium and support. Note other physical attributes, such as color, irregularities, overlays, or secondary supports. Record the existence and location of signatures, markings, and inscriptions.

Examples: "The drawing is in pen on linen with notations in blue pencil."
"Signed and dated in pencil on verso."
“A drawing of an office building by Henry Cobb for a project undertaken by the architectural firm of I.M. Pei and Partners.”

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Record information about materials directly associated with the item from the same or closely related provenance. Especially describe items, such as photographs and textual records, separated or removed to other storage or repositories. Related items are not references, reproductions, published versions, or studies based on the materials.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: Pacific Coast Engineering Co. Specifications, general correspondence files, 1937-1944. Located at Oakland Public Library, Special Collections Department.

Purpose

User-built table (F5, Ctrl-F5)

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

This field classifies architectural records into broad types according to their original intended function. Choose one of the following three entries from the table.

- Design and Construction Documents - These documents were made for a project or built work, during the design and/or construction phase. Examples of types of design and construction documents include contract drawings, design drawings, and shop drawings.

- Record Documents - These documents were made to record what has already been built. Such documents record the appearance of built works after they ere constructed. Examples of types of record documents include topographical views, measured drawings, record drawings, as-built drawings, and reconstructions.

- Undetermined - Choose this entry if you cannot classify the architectural record as either a design and construction document or a record document.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Method of Representation/Point of View (MOR/POV)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field to expand it.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

The field will expand into two subfields: Method of Representation, and Point of View. An underline separates the subfield entries on the item screen.

The subfields are user-built stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click <u>Delete</u> or press Ctrl-Delete to remove unwanted entries.

Method of Representation (F5, Ctrl-F5, F12):

Record the established convention or projective technique used to make an image, such as a section or elevation.
Point of View (F5, Ctrl-F5, F12):

Indicate the position of a real or imaginary viewer relative to the subject depicted, such as bird's-eye perspective.

Note: Method of Representation and Point of View are so closely related as to be often indistinguishable. The *Art & Architecture Thesaurus* is a recommended source for entries.

Example: Profile, section, half elevation, block plan, planting plan, piling plan, reflected ceiling plan

<u>PHOTOGRAPH category:</u>

Item types: Photograph, Slide, Negative (FORM=PHOTOGRAPH)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the specific type of material in the item, such as albumen prints, silver gelatin prints.

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click <u>Select</u> when you have found the term. Click <u>Re:discovery Lexicon</u> to view the term within its hierarchy. Click <u>Save</u> to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click <u>Add</u> or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click <u>Delete</u> or press Ctrl-Delete to remove unwanted entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Use this field to supplement or duplicate the Summary Note field.

Physical Characteristics (Phys Char)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into seven subfields: Condition, Specific Information on Condition, Physical Description, Support, Emulsion, Color, and Manufacturer. An underline separates the entries in the subfields on the item screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5):

Choose an entry from the table to record the overall condition of the item. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field):

Describe the condition of the image. For example, make note of deterioration, tears, foxing, decomposition and shrinkage. Note if the material requires conservation or would be difficult to reproduce. Include the date of inspection. Note if the material is cellulose nitrate that has deteriorated to the point where it must be destroyed.

Physical Description (Physical Desc) (Memo field):

Record a physical description of the item.

Support (Memo field):

Record the material that supports the image, such as glass plate. Include the substance or composition of the film base, such as cellulose nitrate, cellulose acetate, polyester.
Note: Use the AAT, to draw on terms from the Materials Hierarchy (MT).

Emulsion (Memo field):

Record the emulsion, such as negative, positive.

Color (Memo field):

Record the color, such as black and white, tinted, color, or a specific color system.

Manufacturer (Memo field):

Record the name of the company of manufacture for commercial images.

Examples: Photoscapes
Alaska Stock Images

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.

Fully describe the image, beginning with the primary subject.

Examples: "TR standing behind carcass of hippopotamus."
"TR wearing soft hat w/up-turned brim."
"The wagon pictured in this image belonged to Archie Roosevelt and is described in Chapter Three of TR's Autobiography."

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Record information about materials directly associated with the image from the same or closely related provenance. This could be photographs directly associated with reports, field notes, and newspaper articles. It could also be any material for which a photograph was expressly produced to provide documentary support and evidence. Especially describe items, such as related images and textual records, separated or removed to other storage or repositories.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: California. Department of Finance. (Links Collection). Historical record photographs. (F3254:1-307). Located at California State Archives.

Note: Related items are not references, reproductions, published versions, or studies based on the materials. Enter references in the supplemental record for source citation. Enter publications in the supplemental record for publications.

Dimensions

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging. Record the dimensions of the image in height, width, depth, and unit of measure.

Example: H 7, W 5 "

Note: Record dimensions of additional copies of an image in the supplemental record for images.

Inscriptions/Markings (Incr/Marks)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Record any information added to either side of the item, including notes, numbers, and labels. Record where the inscriptions/markings appear on the photograph.

Example: Signed and dated in pencil on verso.
Studio stamp, lower right corner.

CARTOGRAPHIC category:

Item types: Aerial photograph, cartographic, map (FORM=CARTOGRAPHIC)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the physical form or method of production describing the map(s), such as hand drawn, dot grid, vertical stereogram. Enter the function, purpose or use for which the map was made, such as base map, stratification map, vegetation thematic map.

Begin typing or click the down arrows to expand the field. As you type, the Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Use this field to supplement or duplicate the Summary Note field.

Physical Characteristics (Phys Char)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into five subfields: Condition, Specific Information on Condition, Format/Medium, Projection and Scale. An underline separates the entries in the subfields on the item screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5):

Choose an entry from the table to record the overall condition of the item. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field):

Describe the condition of the map. For example, make note of deterioration, tears, foxing, decomposition and shrinkage. Note if the item requires conservation or would be difficult to reproduce. Include the date of inspection.

The subfields for format/medium and projection are both user-built stacked tables. As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Format/Medium (User-built stacked table -- F5, Ctrl-F5, F12):

Record the material on which the map is printed, such as mylar, vellum. Record the media used to produce the map, such as ink, graphite, paint.

Examples: ink on paper
graphite on linen

Projection (User-built stacked table -- F5, Ctrl-F5, F12):

Record the established convention or projective technique used to make the map, such as a section or elevation.

Scale (Memo field):

Record the relative measurement used to produce the map(s). If there is no scale, enter "no scale." The scale indicates the ratio of two units of measurement. It relates the size of the subject depicted to the size of the map. Include the type of scale, unit of measurement, location on the support, and medium. Common types of scale are bar scale, numeric scale, converted scale, reconstructed scale, dimetric scale, and trimetric scale. Include comments, conversions, and clarification in the description, but place them in brackets.

Examples: 660 ft. per in.
10 acres per sq. in.
One inch=One Mile

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.

Fully describe the contents of the map. Include information on the town, county, state, country shown, if known. Note the content of markings/inscriptions and the language.

Examples: A photogrammetric manuscript map of the Pueblo Alto Site, Chaco Canyon National Monument, before excavation, showing walls, trash dump, depressions, elevations, and terrain slope.

A vertical black and white aerial photograph of the Anasazi pueblo ruin of Kin Ya'a, Chaco Canyon National Monument, with prehistoric roadways identified.

Map Source

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into two subfields: Denver Service Center Number (DSC#) and Map Source. An underline separates the subfield entries on the item screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

DSC# (Straight entry field):

Record the DSC# for maps that are part of NPS publications.

Map Source (Memo field):

Record the name of the publisher and/or source(s) of the information detailed on the maps. Include the city, country, and date of publication.

Example: Rand McNally & Company, Chicago, Illinois, 1992.

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Record information about materials directly associated with the map from the same or closely related provenance. Maps are frequently associated with material such as reports, field notes, construction documents, and specifications. Especially describe items, such as related maps and textual records, separated or removed to other storage or repositories.
Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: Bureau of Parks and Recreation. Parks Division Blueprints and Sketches (#127), Construction Files (#89), Park Maintenance Files (#129). Located at New York State Archives.

Note: Related items are not references, reproductions, published versions, or studies based on the materials. Enter references in the supplemental record for source citation. Enter publications in the supplemental record for publications.

MOVING IMAGES category:

Item types: Motion picture, Moving images, Video recording (FORM=MOVING IMAGES)

Specific Material Designation (SMD) (Sp Matl)

Stacked lexicon table (F12, F5) that is linked to the AAT.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Enter the specific type of material, such as film reel, videocassette, laser videodisc, digital video disc.

Begin typing or click the down arrows to expand the field. As you type, the

Term Selector window will open. You can also press F5 or click the lexicon icon to access the lexicon. Type the beginning letters of the term you want and select it from the list. Press Enter or click Select when you have found the term. Click Re:discovery Lexicon to view the term within its hierarchy. Click Save to save the entry to the screen. Refer to the AAT for an explanation of the hierarchy.

You can enter multiple terms. After entering the first term, click Add or press the down arrow key. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash (--) separates entries on the main screen.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Physical Description (Phys Desc)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Use this field to supplement or duplicate the information in the Summary Note field.

Physical Characteristics (Phys Char)

Formatted Memo field. F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into nine subfields: Condition, Specific Information on Condition, Description, Color, Sound, Emulsion, Film Base, Length, and Other. An underline separates the entries in the subfields on the item screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Condition (Bureau controlled table -- F5):

Choose an entry from the table to record the overall condition of the item. The choices are Excellent, Good, Fair, and Poor.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Specific Information on Condition (Specific Inf.) (Memo field):

Describe the condition of the item. For example, make note of deterioration, wear and tear, and chemical decomposition. Note if the material is projectable. Include the date of inspection.

Description (Memo field):

Describe the physical nature of the item and the relationship or combination of technique, medium, and support. Record other physical attributes, such as irregularities.

The subfields for color, sound, emulsion, film base and length are user-built, stacked tables that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Color (User-built stacked table -- F5, Ctrl-F5, F12):

Record the color of the work, such as black and white or a specific color system.

Example: Technicolor

Sound (User-built stacked table -- F5, Ctrl-F5, F12):

Enter the sound system for the work.

Examples: Optical: variable density
Magnetic: four-channel

Emulsion (User-built stacked table -- F5, Ctrl-F5, F12):

Record the emulsion, such as negative, positive.

Film Base (User-built stacked table -- F5, Ctrl-F5, F12):

Include the substance or composition of the film base, such as nitrate, diacetate, triacetate, polyester.

Note: Use the *AAT*, to draw on terms from the Materials Hierarchy (MT).

Length (User-built stacked table -- F5, Ctrl-F5, F12):

Enter the length in feet and/or the playing time of the film.

Example: 29 min.

Other (memo field):

Record other physical characteristics, such as the aspect ratio, projection speed, manufacture of film stock, and processing laboratory.

Summary Note (Summ Note)

Memo field (F12 to expand, or right click and zoom).

Enter data using mixed case letters.

Fully describe the image, beginning with the primary subject. Enter a descriptive summary of the film's contents.

Example: Pomo tribal members demonstrate traditional methods of acorn harvesting, processing, and storing methods that have been developed over many generations. The technical demonstration is intended for the preservation on film of important Native American practices.

Associated Materials (Assoc Matl)

Memo field (F12 to expand, or right click and zoom)

Describe all records directly associated with the film. These could include textual records concerning the various facets of the production. Especially describe items that have been separated or removed to other storage or repositories.

Enter the title of associated materials and the collection, series, file unit, item, and/or catalog numbers if needed.

If associated materials are located in more than one repository, enter the name of the custodian of the related materials.

Example: Video recordings of Civil War Sites Commission Meeting and Ceremonies, April 17, 1991-July 12, 1993. (NN3-220-94-002). Motion Picture, Sound, and Video Branch. National Archives and Records Administration.

Note: Related items are not references, reproductions, published versions, or studies based on the materials. Enter references in the supplemental record for source citation. Enter publications in the supplemental record for publications.

Dimensions

User-built stacked table (F5, Ctrl-F5, F12)

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Record the dimensions of the film, video, or other moving image format.

Examples: 16mm
35mm

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Language

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

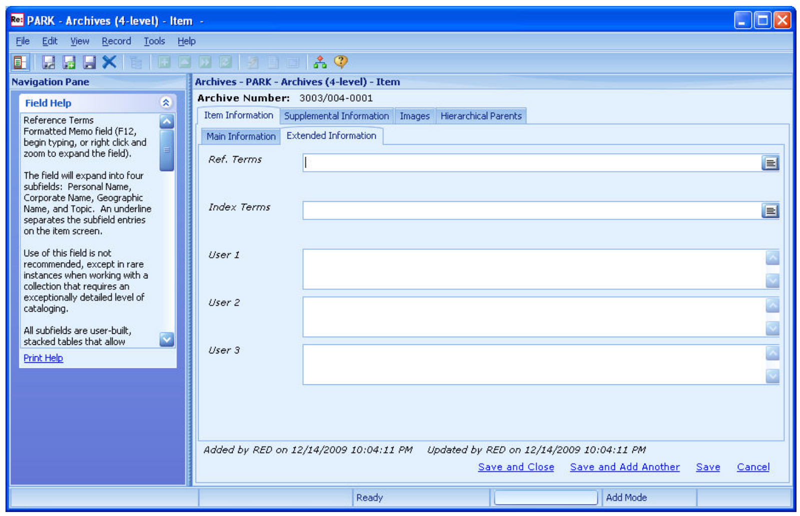
Record the language of the film.

Example: Navajo with English subtitles

You have completed the fields on the Main Information tab. To go to the next page, press Ctrl-N or click on the Extended Information tab.

5. *How do I complete the fields on the Extended Information tab?*

Follow the field-by-field instructions below for completing the fields on the Extended Information tab.



The first two fields (Reference Terms and Index Terms) are common for all categories. The remaining fields may be user fields or variable fields depending on the category entered on the Main Information tab.

Reference Terms (Ref. Terms)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Personal Name, Corporate Name, Geographic Name, and Topic. An underline separates the subfield entries on the collection screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

All subfields are user-built stacked tables (F5, F12, Ctrl-F5) that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select

Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Personal Name:

Enter personal or family names that are subjects of the item. That is, the material is about the person or family. You can also enter names of additional creators, such as correspondents.
Enter names in inverted order, last name followed by the first name. For family names, enter the last name of the family followed by "Family."

Examples: Golsh, Larry
Lincoln Family

Corporate Name:

Enter corporate names that are subjects of the item. A corporate body has a particular name and acts as a group. Some examples of corporate bodies are government agencies, business firms, nonprofit associations, religious bodies and vessels.

Enter the name in direct order.

Examples: Navajo Nation
Tennessee Valley Authority

Geographic Name:

Enter geographic place names that are subjects of the item.

Examples: Columbia River
Gettysburg, PA

Topic:

Enter terms about the subjects of the item.

Examples: shipbuilding
Trail of Tears
Civil War

Note: The table for reference term subfields includes a field for description. If you choose the term from an authority list, such as the Library of Congress Subject Headings, enter the authority in the description. If you use a local term, enter "Local" in the description.

Index Terms

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Form, Genre, Occupation, and Function. An underline separates the subfield entries on the item screen.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

All subfields are user-built, stacked tables (F5, F12,Ctrl-F5) that allow multiple entries.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Form:

Enter terms that designate the physical characteristics of the item.

Examples: maps
glass plate negative
daybooks
reel

Genre:

Enter terms that designate the style or technique of the intellectual contents of the item.

Examples: essays
progress photographs
documentary

Occupation:

Enter the occupations reflected in the item.

Examples: Novelists, American-20th century
Archeologist
shipmaster
soldier

Function:

Indicate the activities or functions that brought the item into being.

Examples: stabilization project
land surveying
oral history project
dedication ceremony

Note: The table for index term subfields includes a field for description. If you choose the term from an authority list, such as the Art & Architecture Thesaurus, enter the authority in the description. If you use a local term, enter "Local" in the description.

Additional Numbers (Addl Numbers) (ARCHITECTURAL category)

Formatted Memo field (F12, begin typing, or right click and zoom to expand the field).

The field will expand into two subfields: NPS DSC # and Other Numbers.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

NPS DSC Number (Memo field):

Enter any National Park Service Denver Service Center number.

Other Numbers (Memo field):

Enter any other numbers associated with the item.

Captions (PHOTOGRAPH category)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Record any captions accompanying the photograph. Published photographs usually have captions. Include the name and date of the publications, if known.

Example: Pennsylvania Dutch. Earthenware dish covered with slip and incised to represent a peacock and foliage. Signed and dated 1793. Metropolitan Museum of Art, New York.

Captions (CARTOGRAPHIC category)

Memo field (F12 to expand, or right click and zoom).

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Record any captions accompanying the map. Published maps usually have captions. Include the name and date of the publications, if known.

Examples: "An orthophotograph of New Alto In Chaco Canyon National Monument with superimposed topographic contours."
"A prehistoric agricultural field (left) portrayed on density analyzer. A modern road crosses the field."

Credits/Cast (MOVING IMAGES category)

Formatted Memo field. Press F12, begin typing, or right click and zoom to expand the field. You can also click the formatted memo icon at the end of the field.

The field will expand into four subfields: Director, Editor, Credits, and

Cast/Talent. An underline separates the entries in the subfields on the item.

Use of this field is not recommended, except in rare instances when working with a collection that requires an exceptionally detailed level of cataloging.

Director (Memo field):

Enter the name(s) of the director(s) of the film.

Example: Leonard Kamerling and Sarah Elder

Editor (Memo field):

Enter the name(s) of the editor(s) of the film.

Example: Ken Burns

Credits (Memo field):

Record the credits for the film, if known. Credits may include writers, cinematographers, musicians, and costume designers.

Cast/Talent (Memo field):

List the significant cast or talent appearing in the film, if known. This usually consists of at least three entries when available.

Example: Bushra Azzouz, Marlene Farnum, Nettie Jackson Kuneki

User fields

These fields are user defined fields. Users with Administrator rights may define the purpose of these fields. Each category can use these fields with different formats. First select a record that contains the category you want to use for the User field.

Right-click in the field and choose Properties from the menu to change the Label, Field Type, and User Help. To define this field for a particular category, click on the Override Labels/Help tab. Select the User record in the list (where the label says User with a number) and click Edit. Enter a new label and select the field type.

Refer to Chapter 1, System Basics for information on field types.

H. Archives Supplemental Records

1. *What supplemental records are available in archives?*

The archives module directories have the following supplemental record types available:

Additional Physical Form
Appraisals
Conditions Reports
Container List
Electronic Resource
Location
Original Duplicates
Preservation
Processing Note

Publication Citation
Restrictions

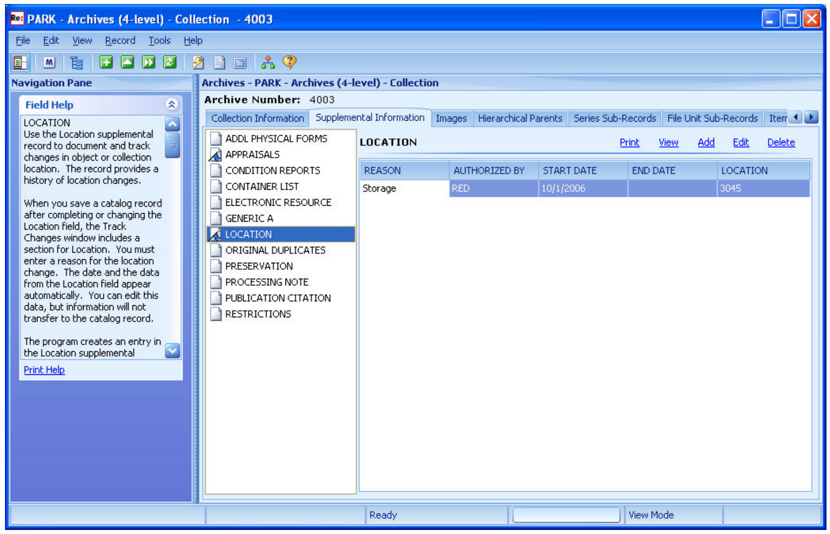
Note: All supplemental records are optional.

2. *Are there different supplementals on each archival level?*

No. The list of supplemental types is the same on all archival levels. But each record at any level has its own supplemental records.

3. *How do I access the Supplemental Records?*

To access the supplemental records associated with an archive record on any level, click on the Supplemental Information tab in the Record Pane.



4. *How can I tell which supplementals have information?*

When you look at the list of supplemental types on the Supplemental Information tab, a flag icon marks the supplementals that contain information.

5. *What supplementals are created when I save a record?*

The program creates the supplemental record for location when you save a record. The program will include the Location supplemental in the Track Changes window. When you complete the information, the program saves it as a supplemental record.

The location supplemental keeps a history of location changes.

6. *How do I add a supplemental record?*

There are generally 2 ways to add a supplemental record depending on whether you want to enter a supplemental for an individual record or a group of records.

To add a supplemental to an individual record:

- On the record that you want to add a supplemental, click on the Supplemental Information tab.
- Select the supplemental type from the list on the left.
- Click <u>Add</u> in the upper right corner of the page. The supplemental entry fields will open.

To add a supplemental to a group of records:

- Activate a Tag Set or Filter, or select multiple records in the List Pane
- Select Mass Supplemental Update from the Edit menu.
- Follow the instructions on the Mass Supplemental Update window to add, update, or delete a supplemental on the group of records.

Refer to Section I.E. in Chapter 3 for detailed instructions on using the Mass Supplemental Update feature.

7. *How do I delete a supplemental record?*

To delete an individual supplemental record:

- select the supplemental type on the Supplemental Information page of the record.
- highlight the supplemental record in the list
- click Delete in the upper right corner of the page

Note: You can also use the Mass Supplemental Update function to delete the same supplemental that appears in multiple records. Refer to Section I.E. of Chapter 3 for more information on the Mass Supplemental Update.

8. *How do I edit a supplemental record?*

To edit an individual supplemental record:

- select the supplemental type on the Supplemental Information page of the record.
- highlight the supplemental record in the list
- click Edit in the upper right corner of the page and the supplemental will open in an edit window
- click Save and Close when finished

9. *How do I complete the Additional Physical Forms supplemental?*

Use the Additional Physical Forms supplemental record to note additional copies of collection material, such as photocopies, duplicate images, etc. It has one memo field.

Forms (memo field):

Enter a description of the additional physical forms available.

10. *How do I complete the Appraisals supplemental?*

Use the Appraisals supplemental record to document the monetary value of an object or collection. The supplemental record will provide a history of appraisals and changes in value.

Reason (User-built table--F5, Ctrl-F5):

Enter the reason for obtaining the value. Possible entries include survey, insurance, accession, deaccession, outgoing loan.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Basis (User-built table -- F5, Ctrl-F5):

Enter the basis for the value. Entries include appraiser, cataloger, market, or other-see note.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Value (Numeric field):

Enter the assigned monetary value of the object. The field includes two decimal places.

Example: 2350.00

Date (Date field):

Enter the date that the value was assigned.

Example: 12/19/1997

Notes (Formatted Memo field, F12 to expand or right click and zoom):

The field will expand into three subfields: Appraiser, Appraisal Report, and Notes.

Appraiser -- User-built stacked table (F5, Ctrl-F5, F12): Links to the Names and Addresses associated module. Enter the name of the appraiser.

As you type, the word will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon to view and select names from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The names and addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash - - separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Appraisal Report -- Memo field (F12): Enter information from the appraisal report or cut and paste the report into the field.
Notes -- Memo field (F12): Enter any additional information, including notes on the basis for the value.

11. *How do I complete the Condition Reports supplemental?*

Use the Condition Reports supplemental record to document and track changes in object or collection condition. The record provides a history of condition.

Entries appear in the table by date, with the most recent date at the top. Entries with blank Date fields will appear first in the list.

Condition (Bureau controlled table - F5):

Indicate whether the object is in excellent, good, fair, or poor condition. You may not add to, delete, or modify terms in this table.

As you type, the term will complete from an authority table of acceptable terms. Press F5 or click the down arrow to view and select terms from the table.

Authorized By (User-built table -- F5, Ctrl-F5):

Enter the name of the person who authorized the entry.

Example: Foxglove, James

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Reason (User-built table -- F5, Ctrl-F5):

Enter the reason for the condition report.

Examples: Breakage
Conservation
Insect Damage

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Date (Date field):

Enter the date of the condition report.

Example: 12/19/1997
Condition Description (Cond Desc) (Memo field):

Enter the condition and any information related to it.

12. *How do I complete the Container List supplemental?*

Use the Container List supplemental record to list the collection's box or folder numbers and titles. All data in this supplemental record are searchable.

Folders (Formatted Memo field -- F12 or right click and zoom):
The field will expand into four fields:

Number -- Memo field (F12). Enter the box or folder number.

Title -- Memo field (F12). Enter the title of the box or folder.

Footnote -- Memo field (F12). Enter a footnote, if applicable.

Other -- Memo field (F12). Enter other information, if necessary.

Examples: <u>File-By-File Listings:</u>
Number: BOX 1
Title: FILE UNIT 1: WASHINGTON, GEORGE
FILE UNIT 2: ADAMS, JOHN
FILE UNIT 3: JEFFERSON, THOMAS
FILE UNIT 4: MADISON, JAMES

Number: BOX 2
Title: FILE UNIT 5: MONROE, JAMES
FILE UNIT 6: ADAMS, JOHN Q.
FILE UNIT 7: JACKSON, ANDREW
FILE UNIT 8: VAN BUREN, MARTIN

<u>First And Last Files In Each Box</u>:
Number: BOX 1
Title: WASHINGTON, GEORGE, TO MADISON, JAMES

Number: BOX 2
Title: MONROE, JAMES, TO VAN BUREN, MARTIN

13. *How do I complete the Electronic Resource supplemental?*

Use the Electronic Resource supplemental record to document the electronic resources available for a collection.

Resource (Formatted Memo field -- F12 or right click and zoom):
The field will expand into three fields:

Electronic Resource -- Memo field (F12). Enter the name of the electronic resource.

Access -- Memo field (F12). Enter access information for the electronic resource.

Data -- Memo field (F12). Enter information about the data for the electronic resource.

14. *How do I complete the Location Supplemental?*

Use the Location supplemental record to document and track changes in object or collection location. The record provides a history of location changes.

When you save a catalog record after completing or changing the Location field, the Track Changes window includes a section for Location. You must enter a reason for the location change. The date and the data from the Location field appear automatically. You can edit this data, but information will not transfer back to the record.

Note: The location supplemental is also created when you use import selected fields that includes the location, use Modify All or Global Search and Replace on the location field, or use Quick Entry that includes the location field.

The program creates an entry in the Location supplemental record using the information from the Track Changes window. The supplemental record also includes the data from the Updated By field on the catalog record. The program enters the data from these fields automatically for each entry. Each additional change in location is recorded as another entry in the supplemental record. The program automatically completes the End Date field of the previous entry with the Start Date of the new entry. The End Date is blank for the most recent entry.

Entries appear in the table by start date, with the most recent date at the top. Entries with blank start date fields will appear last in the list.

If you wish to enter a location supplemental manually, use the field information below.

Reason (User-built table -- F5, Ctrl-F5):

Enter the reason for the location entry.

Examples: Storage
Exhibit
Outgoing Loan

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click <u>Add Term</u>. After entering the term, click <u>Save Change</u>, then click <u>Select</u> to enter the term in the field.

Authorized By (User-built table -- F5, Ctrl-F5):

Enter the name, last name first, of the person who authorized the entry.

Example: Foxglove, James

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select

terms from the table.
Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Start Date (Date field):

Enter the beginning date for this location.

Example: 12/19/1997

End Date (Date field):

Enter the ending date for this location.

Example: 12/19/1997

Note: The program does not automatically update the End Date for manual entries.

Location (Memo field -- F12):

Enter the physical location of the object. The information you add will not be transferred to the Location field on the catalog record.

Example: RM 10 CAB 5 DR A

15. *How do I complete the Original Duplicates supplemental?*

Use the Original Duplicates supplemental record to document the existence of original duplicates of materials in the collection.

Orig/Dups (Formatted Memo field -- F12 or right click and zoom):

The field will expand into two fields:

Listing -- Memo field (F12). Enter the listing for the duplicate.

Location -- Memo field (F12). Enter the location of the duplicate.

16. *How do I complete the Preservation supplemental?*

Use the Preservation supplemental record to document and track preservation treatment that has been proposed or completed. The record provides a history of preservation treatment and a reminder of treatment that needs to be done.

Treatment (User-built table -- F5, Ctrl-F5):

Enter the name of the treatment provider or a generic description for the treatment provider.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Priority (User-built table -- F5, Ctrl-F5):

Enter the priority level for treatment of the object.

Example: High
Medium
Low

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Year (Numeric field):

Enter the four digit year in which the treatment was completed.

Example: 1997

Note: If the treatment has not yet been completed, do not enter the year. Modify the record after treatment to include the year.

Notes (Memo field F12):

Enter the treatment that was done or the treatment that is needed.

17. *How do I complete the Processing Note supplemental?*

Use the Processing Note supplemental record to the actions taken while processing the collection.

Note (Formatted Memo field -- F12):
The field will expand into ten fields:

Action -- Memo field (F12). Enter the action.

Time -- Memo field (F12). Enter the time.

Contingency -- Memo field (F12). Enter the contingency.

Status -- Memo field (F12). Enter the status.

Extent -- Memo field (F12). Enter the extent.

Unit -- Memo field (F12). Enter the unit.

Agent -- Memo field (F12). Enter the agent.

Public Note -- Memo field (F12). Enter the public note.

Non-Public -- Memo field (F12). Enter the non-public note.

Materials Specified (Matls Specif.) -- Memo field (F12). Enter the materials specified.

18. *How do I complete the Publication Citation supplemental?*

Use the Publication Citation supplemental record to note publications in which the object or collection is cited or illustrated.

Citation (Formatted Memo field -- F12):
The field will expand into two fields:

Reference – Memo field (F12): Enter a full bibliographic reference.

Notes – Memo field (F12): Enter additional notes on the citation if necessary.

19. *How do I complete the Restrictions supplemental?*

Use the Restrictions supplemental record to note access or use restrictions that have been placed on an item or collection. The Restrictions supplemental is linked to the Restrictions associated module.

Restriction Number (Restr Nbr) (User-built table -- F5, Ctrl-F5):

Enter the unique identifying number of the restriction. This number is assigned by the unit.

As you type, the program will autofill the entry from the list of restriction records. Press F5 or click the restriction icon to view and select terms from the table.

To add an entry, press Ctrl-F5 or right-click and choose Browse Authority Table. Click Add and the Restrictions associated module screen will open. Enter the restriction number in the Restr Nbr field and complete the other fields on the screen. Refer to Chapter 4, Associated Modules for further information on the Restrictions associated module. When finished click Save and Close. The entry you add will appear in the list. Highlight the desired entry and click Select. (The link icon next to the restriction icon allows you to view the restriction record for your entry.)

Note: Do not modify the Restriction Number after attaching catalog records.

Notes (Memo field -- F12):

Enter notes on the restriction. This field is automatically filled from the Restriction access field after selecting a restriction number. You may enter additional notes by choosing “Manually Update Value” from the pull down menu to the right of the field.

Example: Due to its fragility, access to this collection is restricted.

I. Hierarchical Archives Navigation

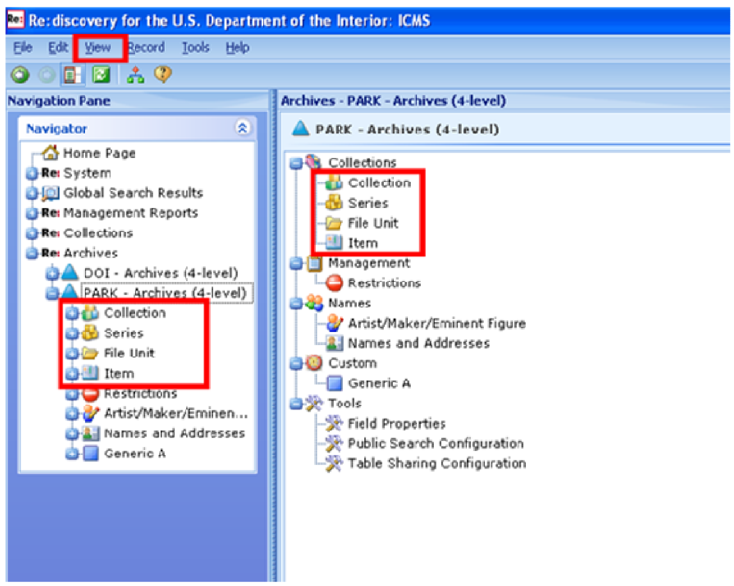
1. *How do I move between levels?*

There are several methods you can use to move between archival levels in the Archives (4-level) directory. These methods depend on your starting point and the record groupings you want to obtain. For example, you may want to view only the Series records for a particular Collection, or you may want to view all File Unit records.

To move between archive levels or access a specific level:

- In the Navigation Pane, select the archival level in the navigation tree directly under the archives directory, *or*

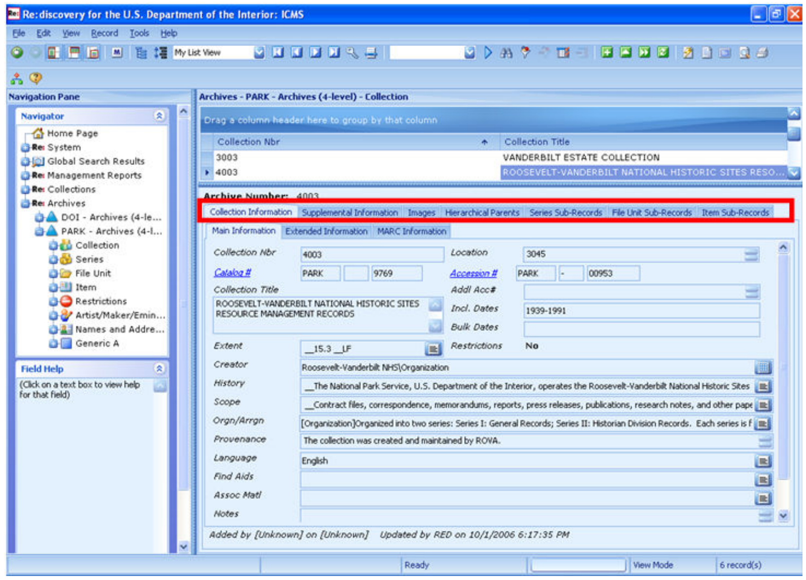
- On the Archives directory page, double-click the archival level under Collections, *or*
- Select the archival level under Go To on the View menu, *or*
- On one of the Level Sub-Records tabs in the Record Pane, click Use These Records to view only records that describe the current record, *or*
- From the Hierarchical Parents tab in the Record Pane, click a record link of a record at a higher level from which the current record belongs, *or*
- Use one of several options in the Hierarchical Browse window. See Section J, Hierarchical Browse below for more information.



2. *How do I move from page to page within an archives record?*

To move from page to page within an archives record:

- Click the tabs, or
- Press Ctrl-N (Next Page) or Ctrl-R (Previous Page), or
- Select Next Page or Previous Page from the View menu



3. *How do I view related records that describe the current record?*

To view related records that describe the current record in more detail at a lower level in the hierarchy without switching to that level and without making those records active in the main List Pane:

- Click the Level Sub-Records tabs (Series Sub-Records, File Unit Sub-Records, or Item Sub-Records) to view the list of sub-records, *or*

- Select the Level Sub-Records tabs under Go To on the View menu to view the list of sub-records

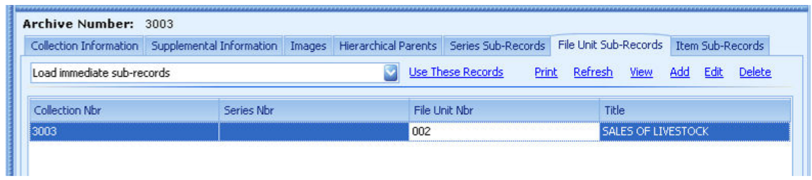
Note: Which Sub-Records tabs appear depends on the active archival level. Each level will have one fewer sub-records tab. A Series record can contain File Unit and Item sub-records while a File Unit record can only contain Item sub-records. An Item record is the lowest level and has no sub-records.

The example above shows the File Unit records associated with the Collection record 3003.

From the Level Sub-Records tab, you have 2 choices of which sub-records to use. Use the drop down list to select either:

- **Load all sub-records (default choice)**: Displays all records that contain the current record's Archive Number within its Archive Numbers. In the above example, for the current collection record 3003, the File Unit Sub-Records Tab lists all File Unit records that have collection "3003" in the Archive Number, even those with various Series numbers.

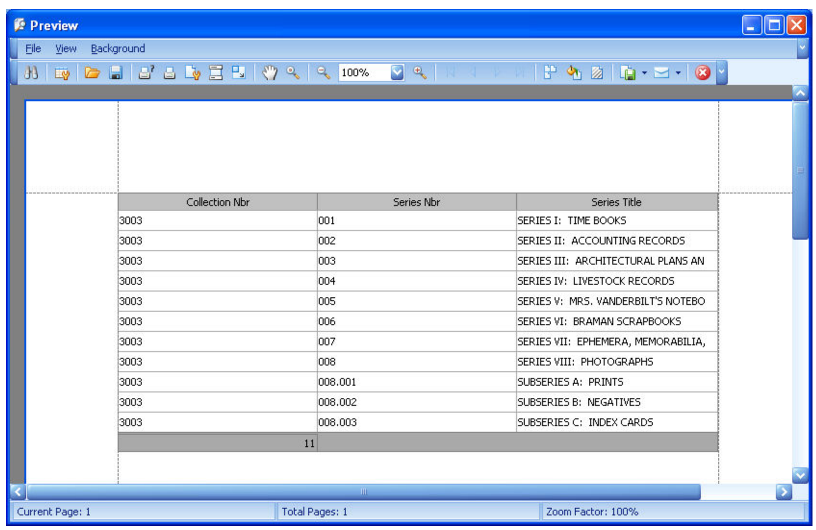
- **Load immediate sub-records**: Displays those sub-records that contain only the current record's exact Archive Number so it shows only those records that fall directly under the current record in the hierarchy with no other level(s) in between. In the following example, for the current Collection record 3003, the File Unit Sub-Records Tab lists File Unit records that only have collection "3003" in the Archive Number, but no series numbers. This is a helpful tool for finding records that are not numbered correctly and are not displaying in the expected place in the Hierarchical Browse.



From these sub-records tabs, using the links at the upper right corner of the page, you can view, add, edit and delete and print a list of associated records at lower levels without leaving the current level.

4. *Can I print the list of related records?*

Yes. On the selected Sub-Records tab, click the Print link at the top to print the list of sub-records. A Preview window opens where you can click the print button or select Print from the File menu.
Note: You can also export this preview to other file types such as PDF, Excel, and text file by selecting Export Document from the File menu or clicking the Export Document button on the button bar.



5. *How do I use these sub-records as my visible data?*

To make the sub-records of an archives record the visible or active data and leave the current level, on the Level Sub-Records tab, click Use These Records.

The screen will refresh to that archival level with the sub-records loaded into the List Pane and the first record in the Record Pane. A hierarchical range is set for this group of records as indicated on the status bar at the bottom left. See Section K below for further information on Hierarchical Ranges.

6. *What are Hierarchical Parents?*

Hierarchical Parents are the records that are related to the current record at the levels above. For example, you can view the Series and/or Collection records to which an Item belongs.

7. *How can I view the Hierarchical Parents for a*

To view a hierarchical tree showing a record's hierarchical parents:

record?

- Click the Hierarchical Parents tab to see the current record and parent records up to the Collection level, *or*

- Select Hierarchical Parents Page tab under Go To on the View menu.

Note: Collection level records have no Hierarchical Parents.

8. *What does the Record Not Found mean on the Hierarchical Parents tab?*

If you have entered a sub-record with a higher level number that does not exist, when you view the Hierarchical Parents tab, that parent will show as Record Not Found.

If you click on this link, the program will inform you that the record does not exist and will give you the option to add it. Click Yes to add the record. A new window will open for that level the record is missing from and the program will autofill the archive parent numbers completely. Click No to not add the record and return to the page.

For example, if you have a File Unit record 3003/009-001 but the series record 3003/009 does not exist, Record Not Found will appear on the hierarchical parents tab with that archive number.

This is a useful feature in locating archive numbering inconsistencies or missing records at higher levels.

Note: You can click on the Record Not Found link on the Hierarchical Parents tab and the program will ask if you would like to add it.

9. *How can I view a record listed in the Hierarchical Parents page?*

To view one of the records at the higher level, click a record link to load that record into the main screen.

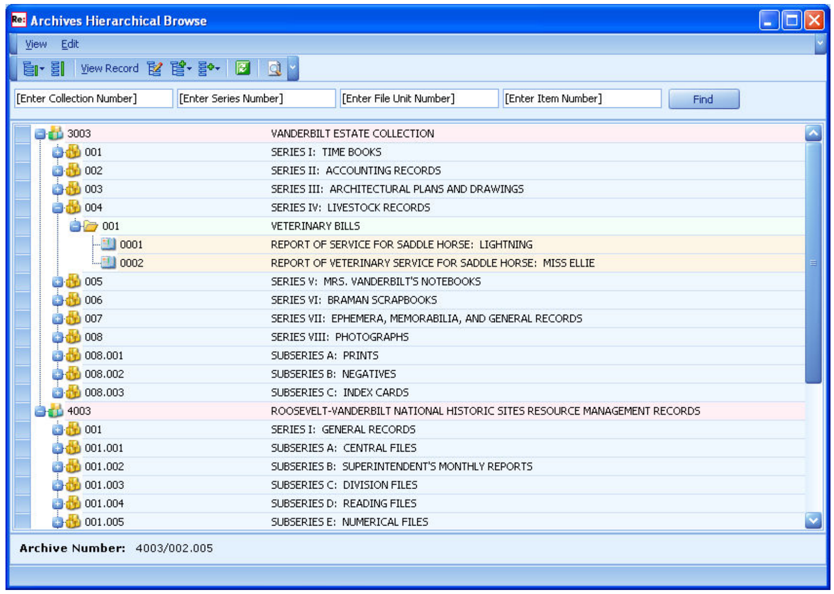
10. *How can I view all records from all levels arranged hierarchically?*

To view all records from all levels in a 4-level Archives directory arranged hierarchically:

- Click the View Hierarchical Browse button  on the button bar, *or*

- Select View Hierarchical Browse from the Record menu.

A new window will open, showing the hierarchical list of records for all levels.



To expand a level, click the + symbol in front of it. Each sub-record is indented below its immediate parent.

Note: If you can't see your record in the Hierarchical Browse window, check to make sure the list is expanded enough to display it. The record may not have an immediate parent. For example, the Hierarchical Browse cannot find File Unit 3003/004-012 if there is not already a Series record for Series 3003/004.

The Hierarchical Browse window can remain open while you work in the main screen so that you can toggle between the views. To toggle between screens, press Alt-Tab.

For further information on using the features in the Hierarchical Browse window, see Section J below.

J. Hierarchical Browse

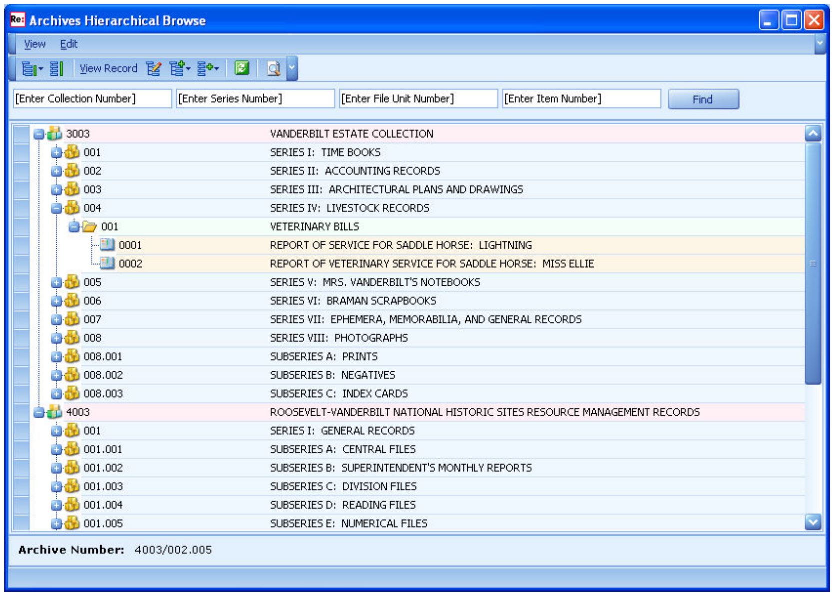
1. *How do I access the Hierarchical Browse?*

The Hierarchical Browse window allows you to view your records in a hierarchical tree format. You can expand and contract levels in the tree view to access sub-records of your collections. Each sub-record is indented under its immediate hierarchical parent. For example, a Collection record may contain several Series records and each Series record may contain several File Unit records. Therefore a Series record is indented under its parent Collection record and the File Unit records are indented below their parent Series record.

To access the Hierarchical Browse:

- Click the View Hierarchical Browse button  on the button bar, *or*
- Select View Hierarchical Browse from the Record menu.

A new window will open, showing the hierarchical list of records for all levels.



To expand a level, click the + symbol in front of it. Each sub-record is indented below its immediate parent.

Note: If you can't see your record in the Hierarchical Browse window, check to make sure the list is expanded enough to display it.

2. *What do the colors and symbols for each line represent in the Hierarchical Browse window?*

In the Hierarchical Browse window, each level in the 4-level archives directory is represented by a different color and symbol to help distinguish the different levels.

- Pink and  are used for Collection records
- Blue and  are used for Series records
- Green and  are used for File Unit records
- Yellow and  are used for Item records

3. *What features are available in the Hierarchical Browse window?*

There are several features available from the Hierarchical Browse window. These can be accessed from the button bar or the right-click menu.

- View and modify a single record from this list
- Add records to any level associated with any record
- Load the sub-records of a record to the List Pane and Record Pane

Right-click menu options

4. *How do I view a record in the hierarchical list?*

To view a single record from this list:

- with the record highlighted, click View Record on the button bar, *or*
- right-click on the record and select View Record

The record will open in a separate window.

5. *How do I modify a record in the hierarchical list?*

To modify a single record from this list:

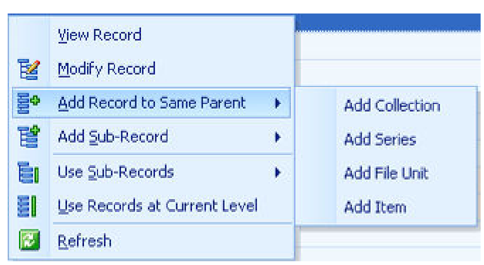
- with the record highlighted, click the Modify Record button on the button bar, *or*
- right-click on the record and select Modify Record

The record will open in a separate window. Click Save and Close when finished.

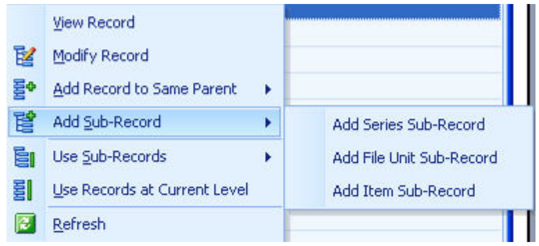
6. *How do I add a record while in the hierarchical list?*

You can add a new record at any level associated with any record. There are two choices for adding new records which can be accessed from the button bar or when you right-click on a record in the list:

- Add Record to Same Parent ( ) will add a record to the hierarchical parent of the current record. Select the level of record that you want to add from the sub-menu. For example, you could add a new Series record associated with the same Collection record as the Series record you choose in the list.



- Add Sub-Record ( ) will add a record to the level you choose on the sub-menu. The new record will be associated with the current record in the list by automatically filling in the archive number from that record. For example, you could add an File Unit record associated with the Series record you choose in the list.

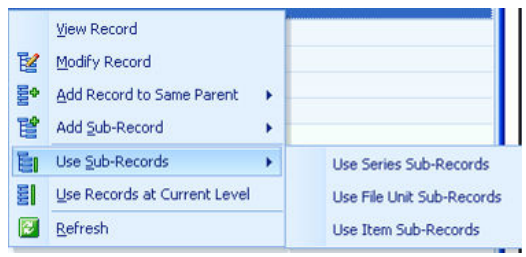


A new record window will open in Add Mode for you to complete. See Sections D-G above for information on completing the fields on a specific archival level.

7. *How can I load the records in the hierarchical browse to be my visible data?*

There are two options for loading records to the List Pane and Record Pane to become your active data. These can be accessed from the right-click menu or the button bar.

- To load the sub-records of a record to the List Pane and Record Pane of the main system screen, select Use Sub-Records ( ) then select the level to load from the sub-menu.



- To load the records at the same level, select Use Records at Current Level ( ).

The records are loaded into the List Pane and Record Pane of the main screen. A hierarchical range is set for that collection as indicated on the status bar at the bottom left. You can toggle (Alt-Tab) to the main screen to view these records.

Note: The Hierarchical Browse window can remain open while you work in the main screen so that you can toggle between the views. To toggle between screens, press Alt-Tab.

8. *How can I find a specific record in the Hierarchical Browse window?*

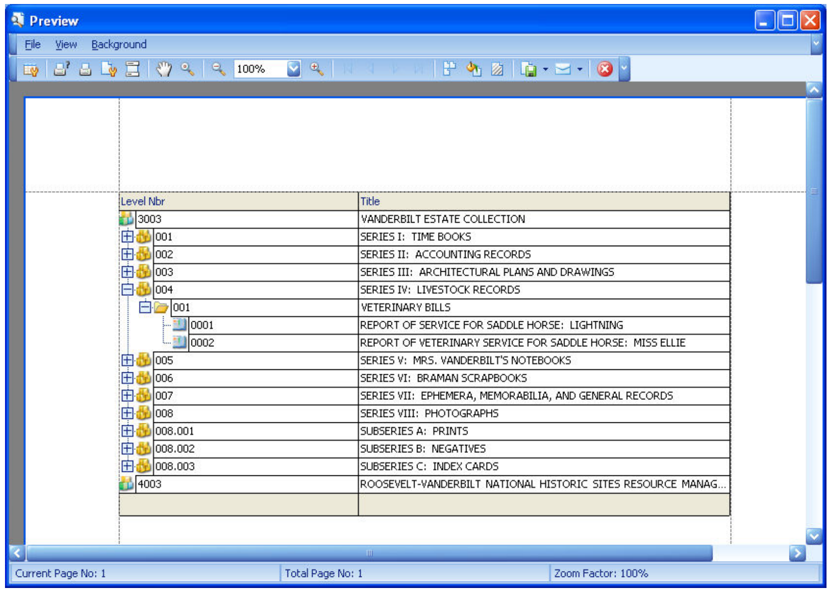
To find and quickly go to a specific record in the hierarchical browse view, enter the archive number in the fields at the top of the list. Enter as many parts of the archive number in the corresponding field as necessary. Then click Find. The program will jump to that record in the list. If the record is not found, the list will remain in the same location when you click Find.

9. *Can I print the Hierarchical Browse list?*

Yes. To print the hierarchical browse list:

- Click the print preview button on the button bar, *or*
- Select Print Preview from the View menu.
- A Preview window opens where you can click the print button or select Print from the File menu.

Note: You can also export this preview to a PDF or graphic document by selecting Export Document from the File menu or clicking the Export Document button on the button bar.



K. Hierarchical Ranges and Viewing Related Records

1. *What is the Hierarchical Range function?*

The Hierarchical Range function uses the Archive Number to limit the visible data to a specific Collection, Series, or File Unit. The hierarchical ranges are set automatically if you use the related records functions in Re:discovery to navigate through the levels. The system takes you to the desired level, sets the range on that level, and the Status Bar displays "Hierarchical Range" in the lower left to show what range is set.

For example, to make your active data include all of the File Units that are part of a particular Collection, the system sets a Hierarchical Range so that every File Unit record containing that Collection number in the Archive Number is visible.

The ranges are set only at that level. The Hierarchical Range function does not universally affect all levels at one time.

2. *How do I activate the Hierarchical Range at a specific level?*

There are several ways to activate a hierarchical range:

- From the Level Sub-Records tab of a Collection, Series, or File Unit record, click Use These Records. The records listed on the Sub-Records tab will be loaded into the List Pane and Record Pane as your visible data and a hierarchical range will be set for that collection, series and/or file unit number.

- From the Hierarchical Browse window, select Use Sub-records or Use Records at Current Level from the right click menu on a record, or from the View menu. The sub-records or current level records will be loaded into the List Pane and Record Pane with the hierarchical range set for the records at the level selected.

- From the main screen of a level, you can activate the hierarchical range by clicking the hierarchical range button on the button bar or select Use Hierarchical Range from the Record menu. The Hierarchical Range that gets activated is based on the combination of the higher level archive number fields in the current record.

Note: To go to a level without activating a range, select the level from the Navigation Pane or from Go To on the View menu. The active data from the last time you viewed that level will be visible (i.e., if you had a tag set active on that level when you left, that tag set will still be active until you deactivate it or exit the program.)

3. *How do I deactivate a hierarchical range so that I can view all records at the current level?*

If you have a Hierarchical Range currently set, "Hierarchical Range" appears in the lower left of the Status Bar and the button on the button bar appears depressed. To deactivate the hierarchical range and see all records at the current level:

- click the button on the button bar to deselect it, *or*
- select Use Hierarchical Range from the Record menu

For example:

If you have selected Item Record RG003/001-002#005 in the List Pane so it is loaded in the Record Pane, and then you click the Use Hierarchical Range button, the Hierarchical Range set will include all records that are part of the 002 File Unit from the 001 Series in the RG003 Collection. All records in the range will have RG003/001-002 in the Collection/Series-File Unit number fields.

If you select Item Record RG003/-#001 (Series and File Unit levels are skipped), and then click Use Hierarchical Range, the range will include all records that are in the RG003 Collection but have no Series or File Unit affiliation. They will all have RG003 in Collection Number but Series Number and File Unit Number will be blank.

4. *Can I activate a Tag Set or Filter with the Hierarchical Range activated?*

Yes. The system recognizes that you may want to use Tag Sets, Filters, and the Hierarchical Range together to limit your visible data. The data sets work together as follows:

- If you have the Hierarchical Range active and you activate a Quick Filter or Advanced Filter, the system applies the Filter and the Hierarchical Range together. Only records that match the Filter <u>and</u> are in the Hierarchical Range will be listed in the List Pane.
- If you have a Quick Filter or Advanced Filter active and then you activate the Hierarchical Range, the system deactivates the filter and activates the Hierarchical Range. The Hierarchical Range that gets activated is based on the combination of the higher level archive number fields in the current record.
- If you have the Hierarchical Range active and then you activate a Tag Set, the system applies the Tag Set and Hierarchical Range together. Only records that are in the Tag Set <u>and</u> in the Hierarchical Range will be listed in the List Pane.
- If you have a Tag Set activated and then you activate the Hierarchical Range, the system deactivates the Tag Set and activates the Hierarchical

Range. The Hierarchical Range that gets activated is based on the combination of the higher level archive number fields in the current record.

L. Finding Aid/SGML

1. *What is the Finding Aid/SGML function?*

Use this function to create an archival finding aid document.

2. *What formats are available for the Finding Aid?*

You can create the finding aid in two file formats:

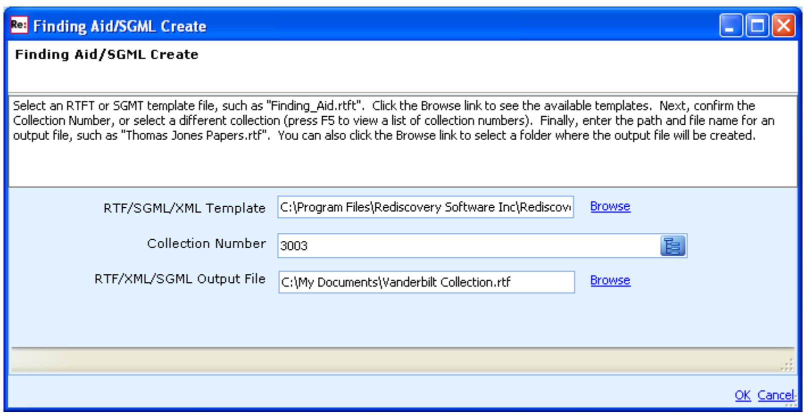
- RTF (rich text format), which can be opened with Microsoft Word.
- XML (extensible markup language), which can be opened with some web browsers, converted to HTML, or imported into XML compatible databases.

3. *How do I access the Finding Aid/SGML function?*

You can only use the Finding Aid/SGML function on the Collection level of the four-level archives directory.

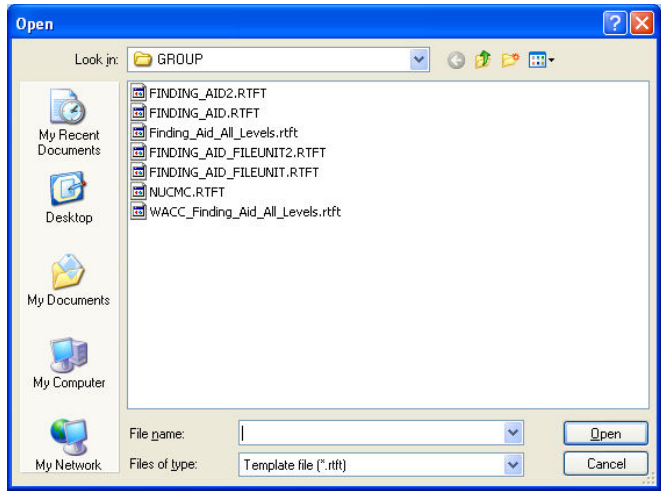
- select a Collection level record for which you want to create a finding aid
- then from the Record menu, choose Finding Aid/SGML

The Finding Aid/SGML window opens.



4. *How do I create a finding aid?*

- For the RTF/SGML/XML Template field, click Browse to select a template file.



- To create an RTF finding aid, choose from 4 available RTFT templates:

  Finding_Aid2.RTFT – creates a finding aid of the Collection that includes Series information and a Container List.

  Finding_Aid_Fileunit2.RTFT – creates a finding aid of the Collection that includes Series and File Unit information.

  Finding_Aid_All_Levels.RTFT – creates a finding aid of the Collection that includes Series, File Unit and Item record information.

  NUCMC.RTFT – creates a finding aid formatted for the National Union Catalog of Manuscript Collections

Note: You can also choose an SGML format by choosing (*.sgmt) in the Files of type drop down at the bottom. There is only one template available for SGML.

- When you have selected the template, click Open.

- Confirm the collection number of the Collection level record you selected. Or, click the hierarchical browse icon to view and select from a list of collection numbers.

- To select an output file, click <u>Browse</u> at the end of the RTF/XML/SGML Output File field. You may select the folder where you want the file to be stored, and enter a name for the file.

- Click <u>OK</u> to create the finding aid document. Your file will be saved in the location you specified, with the name you entered.

- You will get a confirmation message when it is complete. Click OK.

- You will return to the Finding Aid/SGML window. Click <u>Cancel</u> or the red X in the upper right corner to close the window.

5. *What fields map to the printed Finding Aids?*

Each finding aid includes specific fields from the Collection, Series and File Unit records as follows:

<u>Finding_Aid2.rtft fields (.sgmt template is the same)</u>

Collection:	Collection Number Catalog Number Collection Title Inclusive Dates Bulk Dates Extent Restrictions History Scope Organization/Arrangement Provenance Associated Materials Processed By Container List supplemental records
Series:	Series Title Inclusive Dates Bulk Dates Organization/Arrangement Scope

Finding_Aid_FileUnit2.rtft fields

This template contains the same fields as the Finding_Aid2.rtft with the addition of the following fields from the File Unit records.

File Unit:	File Unit Number Title Dates Summary Note

Finding_Aid_All_Levels.rtft fields

Collection:	Collection Number Catalog Number Accession Number Collection Title Inclusive Dates Bulk Dates Extent History Scope Organization/Arrangement Provenance Finding Aids Processed By
Series:	Series Number Series Title Accession Number Catalog Number Inclusive Dates Bulk Dates Organization/Arrangement Scope Provenance
File Unit:	File Unit Number Dates Title

Summary Note

Item: Item Number
Title
Dates
Creator
Physical Description

<u>NUCMUC.rtft fields</u>

Division/Unit, Address and Email fields from the Names and Addresses associated module for the NPS UNIT or DOI UNIT record.

Collection: Collection Title
Inclusive Dates
Bulk Dates
Creator
Extent
History
Scope
Provenance
Restrictions
Finding Aids (first one only)

6. *Can I change these templates?*

No. If you want to modify the finding aid templates, please contact Rediscovery Software Inc for assistance. You may have to purchase customization for significant changes to a template.

M. MARC Records

1. *What are MARC records?*

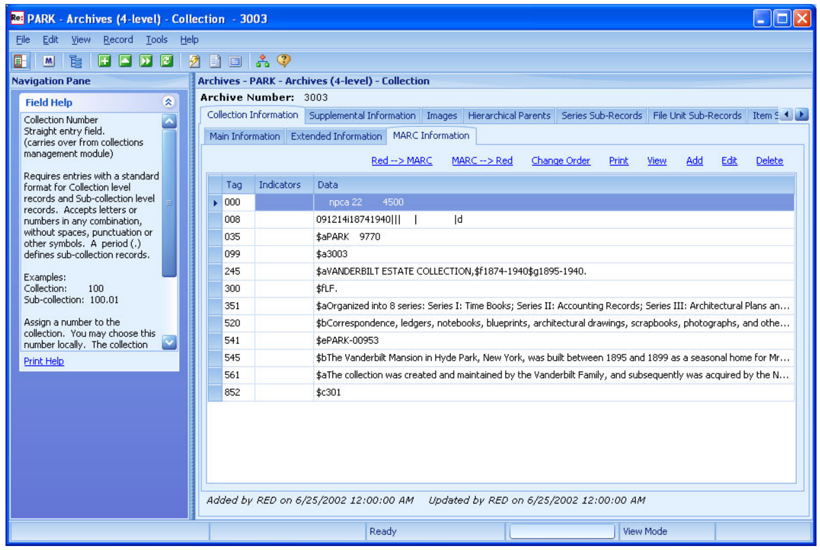
A MARC record is a "**MA**chine-**R**eadable **C**ataloging" record used by library systems.

2. *How do I view MARC records?*

To view a MARC record:

- click on the MARC Information tab located on the Collection Information tab of a Collection level record, *or*

- from the Collection Information tab, press Ctrl-N (next page) until the MARC Information tab is selected.



3. *Where can I create MARC records?*

MARC records can only be created on the Collection level of a four-level archives directory.

4. *Must I create MARC records of my collection records?*

No. Creating MARC records is optional.

5. *When would I need to create MARC records of my collection records?*

You may want to create MARC records of your collection records if you need to share your collections information with other non-Bureau libraries or institutions who have systems that can read MARC data.

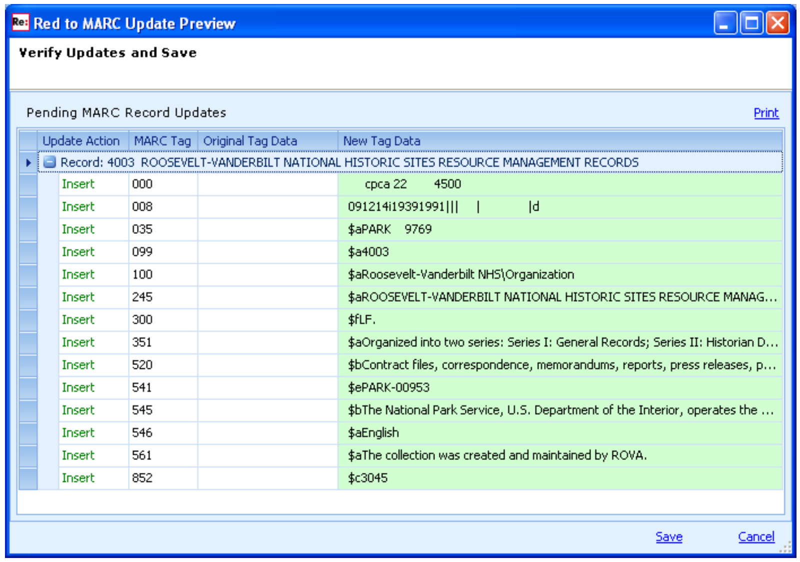
6. *How do I create a MARC record?*

To create a MARC record:

- First add and save a collection record on the Main Information page.
- In Menu mode, click the Create MARC Record link at the bottom of the Main Information page.

  or

  On the MARC Information tab, click the Red → MARC link.
- A Red to MARC Update Preview window will open showing what MARC tags will be created (inserted) and which ones will be updated if they already exist.



Update Action -- indicates the action that will be taken for that MARC tag. You will see either Insert, Update, or Delete.

MARC Tag -- the number of the MARC tag on which the action is being performed. These MARC tags are mapped to specific fields on the Collection record.

Original Tag Data -- will display data from an existing MARC tag if there already exists a MARC record for the Collection record. This will only be displayed if the incoming MARC tag data differs from the existing MARC tag data or if the data has been deleted from the corresponding field.

New Tag Data -- the data that will be created or updated for the specific MARC tag.

- Click Save to create/update/delete these MARC tags.

- You will get a confirmation message that the MARC record was created or updated. Click OK.

You can now view your MARC record on the MARC Information page.

Warning. Creating a MARC record for a collection record that already has a MARC record will overwrite the existing MARC record with the information from the Main Information page. If you have MARC tags that were entered manually (see M.9 below) and that information does not appear on the Main Information page, that MARC information will be lost.

7. *Can I create MARC records for a group of collection records?*

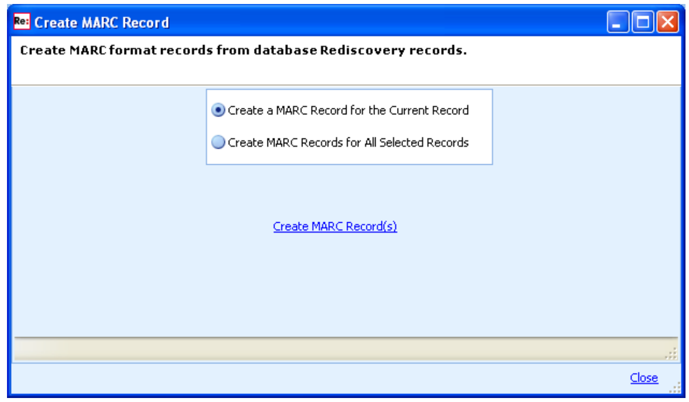
Yes. To create MARC records for a group of records:

- First, select a group of records by activating a tag set, filter or selecting multiple records in the List Pane. **Note:** If you do not limit your visible data, you can create MARC records for your entire Collection level database at once.

- click the Create MARC Record(s) button  on the button bar, *or*

- Select MARC from the Edit menu and choose Create MARC Record(s).

- The MARC Create window will open.



Warning. Creating MARC records for collection records that already have a MARC record will overwrite the existing MARC record with the information from the Main Information page. If you have MARC tags that were entered manually (see M.9 below) and that information does not appear on the Main Information page, that MARC information will be lost.

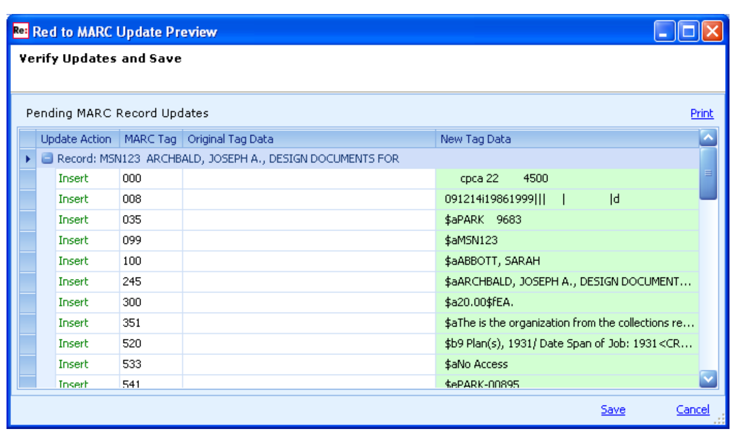
- Select one of the scope options:

  Create a MARC record for the Current Record – will create a MARC record for the collection record currently loaded in the Record Pane only.

  Create MARC Records for all Visible Records – will create MARC records for all records currently visible in the List Pane. If you have a tag set, filter, or multiple records selected in the List Pane, the MARC records created will be limited to those records contained in that subset. Otherwise, MARC records will be generated for every record in the collections database.

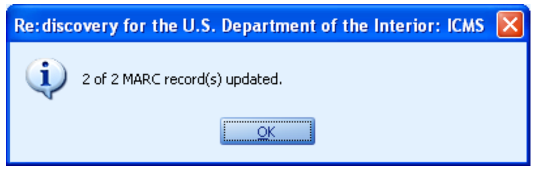
- Click Create MARC Record(s).

- The Red to MARC Update Preview window will open showing all the MARC tags that will either be created, updated or deleted for each record selected.



- Click Save to create the MARC records.

- A confirmation message will appear indicating how many MARC records were created. Click OK.



- Click <u>Close</u> on the MARC Create window.

8. *What fields map to the MARC record?*

All fields on the Collection Information's Main Information page are mapped to a MARC tag. The first three fields on the Extended Information page are mapped to a MARC tag.

The fields are mapped as follows:

Field Name	***MARC Tag***
Accession #	541e
Additional Accessions	541e
Associated Materials:	
Related Collection	544d
Collection Custodian	544a
Bulk Dates	245g
Catalog #	035a
Catalog Source:	
Agency	040a
Description	040e
Collection Number	099a
Collection Title	245a
Creator:	
(personal)	100a
(corporate)	110a
Finding Aid:	
Finding Aid	555a
Lvl of Control	555c
History:	
Brief note	545a
Expansion note	545b
Inclusive Dates	245f
Index Terms:	
Form	655a
Genre	655a
Occupation	656a
Function	657a
Language:	
Language Note	546a
Language Code	041a
Location	852c
Notes	500a
Access restrictions	506a
Publication restrictions	540a
Duplication restrictions	540a
Organization/Arrangement:	
Organization	351a
Arrangement	351b

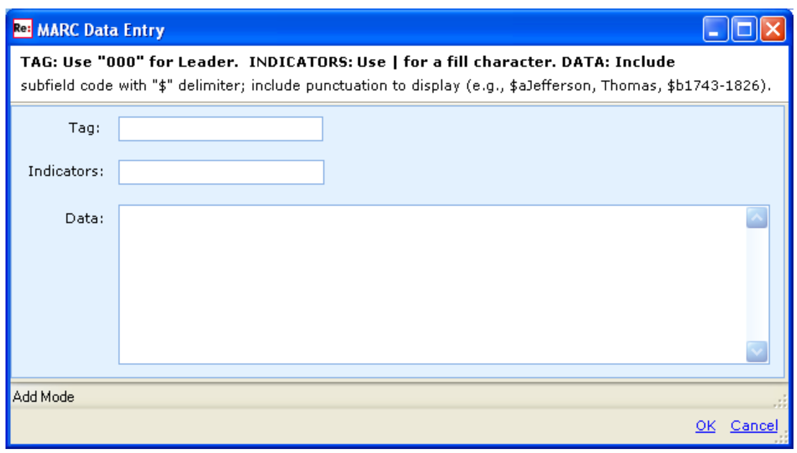
Processed by	
Processed by	583k
Processing Date	583c
Provenance	561a
Reference Terms:	
Personal Name	600a, 696a
Corporate Name	610a, 697a
Geographic Name	651a, 691a
Topic	650a, 690a
Scope:	
Summary Note	520a
Expansion Note	520b
Volume:	
Count	300a
Extent	300a
Type of Unit	300f

9. *Can I manually add or update a MARC tag?*

Yes. You can add or edit MARC tags manually on the MARC Information tab, but that information does not transfer back to the Main Information tab of the collection record.

To add a MARC tag manually:

- On the MARC Information page, click the Add link in the upper right corner of the page. The MARC Data Entry window will open.



- Enter the MARC tag in the Tag field. This is the number corresponding to the MARC information that is being entered. For example, 245 is the title information, 541 is the accession number. **Note:** You must know MARC cataloging procedures to select the correct number. For further information, see the Library of Congress MARC 21 bibliographic data web site (http://www.loc.gov/marc/bibliographic/ecbdhome.html).

- Enter any indicators in the Indicators field. Use the | for a fill character

- Enter the information into the Data field. This is the information that corresponds to the MARC tag you are entering. E.g., the title, the accession number, etc. Include the subfield codes preceded with a '$' delimiter and include any punctuation that you want to display.

Example: $aJefferson, Thomas, $b1743-1826

- When finished, click <u>OK</u> to save the MARC data. The MARC tag you entered will appear in the list of tags.

To edit a MARC tag:

- On the MARC Information page, select the MARC tag you wish to edit in the list.

- click the <u>Edit</u> link in the upper right corner of the page. The MARC Data Entry window will open displaying the information in the MARC tag selected.

- Modify the information as needed, then click <u>OK</u> to save the MARC data.

Note: You can also simply view the contents of a MARC tag to see the entire Data field by clicking the <u>View</u> link in the upper right corner.

10. *Can I delete individual MARC tags?*

Yes. To delete an individual MARC tag from a record:

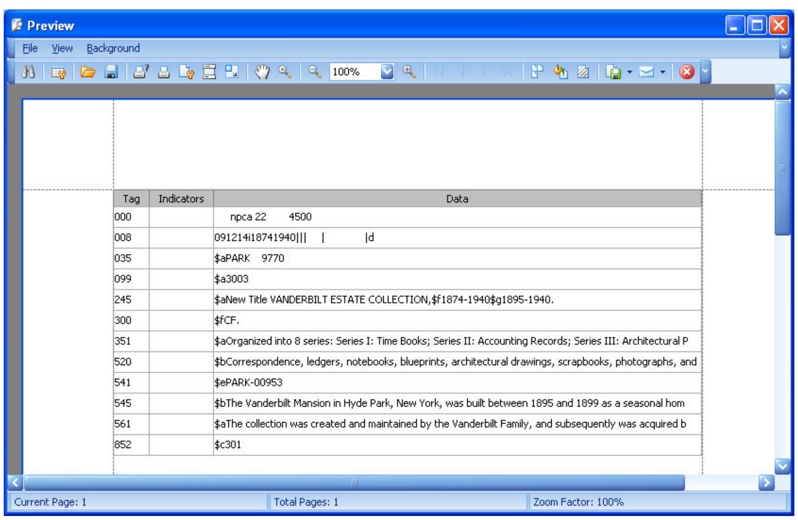
a. On the MARC Information page, select the MARC tag in the list.

b. Click <u>Delete</u> in the upper right corner of the page.

A message will open asking if you are sure you want to delete the selected MARC tag. Click Yes to permanently delete the selected tag.

11. *Can I print the MARC information?*

Yes. To print the MARC tags displayed on the MARC Information tab, click Print in the upper right corner of the page. A print preview will open where you can click the print button, or select Print from the File menu.



Tag	Indicators	Data
000		npca 22 4500
008		091214i18741940||| | |d
035		$aPARK 9770
099		$a3003
245		$aNew Title VANDERBILT ESTATE COLLECTION,$f1874-1940$g1895-1940.
300		$fCF.
351		$aOrganized into 8 series: Series I: Time Books; Series II: Accounting Records; Series III: Architectural P
520		$bCorrespondence, ledgers, notebooks, blueprints, architectural drawings, scrapbooks, photographs, and
541		$ePARK-00953
545		$bThe Vanderbilt Mansion in Hyde Park, New York, was built between 1895 and 1899 as a seasonal hom
561		$aThe collection was created and maintained by the Vanderbilt Family, and subsequently was acquired b
852		$c301

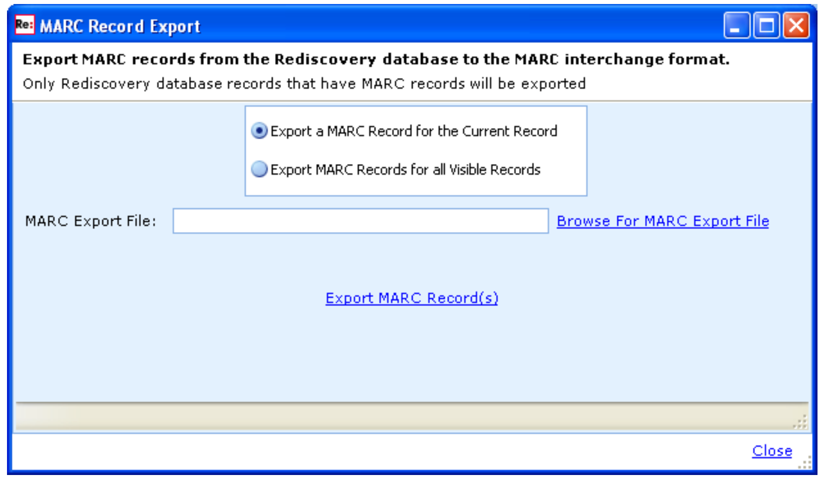
12. *How do I export MARC records?*

To export MARC records that have been created:

- First, you may want to limit your visible data by activating a tag set, filter or selecting multiple records in the List Pane. If no subset is active, the export function can export **all** MARC records in your collections database.

- Then, from the Edit menu select MARC and Export MARC Record(s)

- The MARC Record Export window will open.



- Select the scope for export:

  Export a MARC Record for the Current Record – will export the MARC record for the collection record currently loaded in the Record Pane only.

  Export MARC Records for all Visible Records – will export MARC records for all records currently visible in the List Pane. If you have a tag set, filter, or multiple records selected in the List Pane, the MARC records exported will be limited to those records contained in that subset. Otherwise, the export function will export **all** MARC records in your collections database.

- Next, enter a path and file name for the export file that will be created. You can click Browse for MARC Export File to select a location. Just enter the name of the file to be created into the File Name field.

Note: If you do not enter a path with the file name, the default location where the MARC export file is saved is C:\Program Files\Rediscovery Software Inc\Rediscovery Version8.0\VisualRediscovery\Reports\Group.

- Click Export MARC Record(s).

- A message will appear asking if you are sure you want to export MARC records for the selected number of visible records. Click Yes to export the MARC records.

- You will get a confirmation message of how many records were exported. Click OK.

Note: The number of records exported in the confirmation message may be less than your visible data if every record does not have a MARC record created for it. The export will not create MARC records for collection records that do not have one already.

- Click Close on the MARC Record Export window.

You may want to send this exported file to an on-line bibliographic service, such as the Research Library Information Network (RLIN), the Online Computer Library Center (OCLC), or the Online Archive of California. Each unit, however, would have to make its own arrangements with the service they choose in order to do that.

13. *Can I import MARC records?*

No. You cannot import MARC records. Archival collections are inherently unique and thus generally do not have MARC records already created by other institutions like published materials.

N. Archives Reports

1. *What reports are available in the Archives Module?*

The following reports are available in the four-level archives directory:

All Levels:
- 10-645 Separation Sheet.doc
- 10-96 Folder List.doc
- All Fields
- Container List.doc

Collection Level only:
- Archives Worksheet.doc
- Collection Totals
- Copyright Notice
- Survey Form

Series Level only:
- Series Totals

File Unit Level only:
- File Unit Totals

Item Level only:
- Foldlist
- Item Level Archives Worksheet.doc
- Item Totals

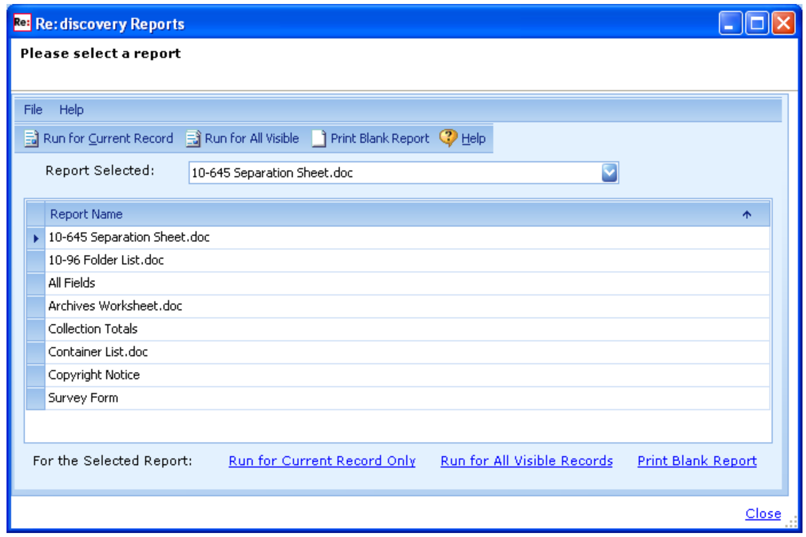
2. *How do I run a report in the Archives Module?*

Reports in the Archives Module are run the same way as in any other directory. You can run the reports on a single record or all visible data. To run a report on a subset of your data, activate a tag set, filter or select multiple records in the List Pane using Shift-click or Ctrl-click.

To run a report from any archival level:

- Click the Reports icon on the button bar, *or*

- Select Re:discovery Reports from Reports on the Record menu. The Re:discovery Reports window will open.



- Select the report name in the list that you wish to run.

- Click one of the following run options on the tool bar or at the bottom of the window:

  Run for Current Record only – will print the report with the information from the record currently loaded in the Record Pane.

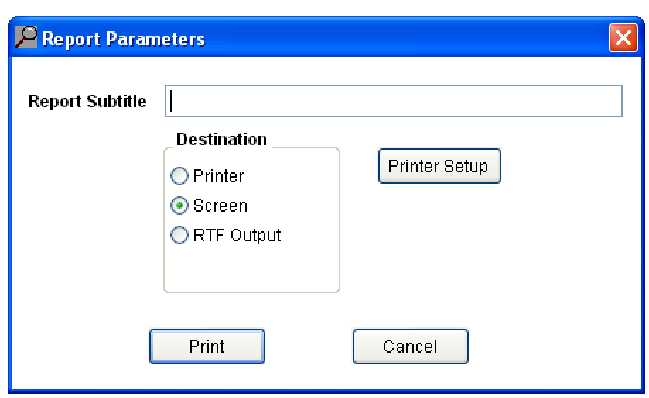
  Run for All Visible Records – will print the report with information from all selected records visible in the List Pane. You can limit the records that will be printed on the report by activating a tag set, filter or selecting multiple records in the List Pane using Shift-click or Ctrl-click.

  Print Blank Report – will print a blank form with no information from current records.

Note: Some reports are Word documents and will open in your Microsoft Word program. Print the report as you would any other Word document.

- Next, in the Report Parameters window, select the destination to send the report.

Note: The Report Subtitle is not included on most reports. Anything you enter will not print on the report.



Printer – will send the report directly to the default windows printer.

Screen – will allow you to preview the report before printing. **Note:** The preview window includes a printer button to send the report to the printer after previewing.

RTF Output – will create a RTF (rich text format) file that you can open in Word. This allows you to send the report electronically to others. **Note:** You will be prompted for a location and file name to save the report if you choose this option.

- The Printer Setup button will allow you to change the printer and print properties such as paper size and orientation.
- Click Print after selecting your destination.

3. *How do I print the 10-645 Separation Sheet.doc?*

The NPS form 10-645 Separation sheet is a Word document. Use this report to indicate that a document has been withdrawn from a file because access to it is restricted, or because the document needs to be stored in another location.

When you select this report in the list, click Run for Current Record only. The report will open in Microsoft Word where you can enter information as desired. Print it as you would any other Word document.

4. *How do I print the 10-96 Folder List.doc?*

The NPS form 10-96 Folder List.doc is a Word document. Use this report for developing a detailed, box-by-box list of folders within a collection.

When you select this report in the list, click Run for Current Record only. The report will open in Microsoft Word where you can enter information as desired. Print it as you would any other Word document.

Note: A container list may also be created using the Container List supplemental (see Section H above). A container list developed in this fashion will automatically be incorporated into printed and electronic finding aids produced through the Finding Aid/SGML function (see Section L above).

5. *How do I print the All Fields report?*

The All Fields report prints the information from every field that contains data in the record. The fields are listed alphabetically.

To run the report:

- Select the All Fields report in the Re:discovery Reports window.
- You can run this report for either the Current Record or All Visible if you have a subset active.

6. *How do I print the Container List.doc?*

The Container List.doc is a Word document. Use this report for developing a basic, box-by-box list of file units or folders within a collection.

When you select this report in the list, click Run for Current Record only. The report will open in Microsoft Word where you can enter information as desired. Print it as you would any other Word document.

Note: A container list may also be created using the Container List supplemental (see Section H above). A container list developed in this fashion will automatically be incorporated into printed and electronic finding aids produced through the Finding Aid/SGML function (see Section L above).

7. *How do I print the Archives Worksheet.doc?*

The Archives Worksheet.doc is a Word document and is available on the Collection Level. Use it as a worksheet to fill out catalog records for the Archives disciplines to aid in data entry.

When you select this report in the list, click Run for Current Record only. The report will open in Microsoft Word. Print it as you would any other Word document.

Note: This report is also available in the Cultural Resources directory. See Chapter 5, Printing and Reports.

8. *How do I print the Collection Totals report?*

The Collection Totals report is only available on the Collection level. It provides a sum of the Extent and Count subfields within the Extent field on the Collection level. Use this report when you need to total the Extent and/or Count fields on a group of records.

To run the report:

- Select a subset of your data, if desired, by activating a tag set, filter, hierarchical range, or selecting multiple records in the List Pane. If you don't select a subset, the report will total all records visible in the List Pane.
- Select the Collection Totals report in the Re:discovery Reports window.
- Run the report on All Visible records to get a total.

The report includes the totals for Extent and Count as well as the number of records.

9. *How do I print the Copyright Notice report?*

The Copyright Notice report is available on the Collection level. It provides the copyright and privacy restrictions for visitors and researchers to sign. This form is not mapped.

Note: This form is also available in the Names and Address associated module. See Chapter 4, Associated Modules.

10. *How do I print the Survey Form report?*

The Survey Form is available on the Collection level only. Use this form for unprocessed archival material to assist you in documenting where a collection is located, how voluminous it is, what kinds of documents it contains, how it is arranged, and what the basic content is.

Note: Surveys are optional. Materials that have already been fully cataloged (with screens completed in the Archives Module as well as in the Collections Management Module) do not need to be surveyed.

The following fields from the Collection level record are mapped to this report.

Accession #
Associated Materials
Bulk Dates
Catalog #
Collection Title
Creator
Extent
Finding Aids
History

Inclusive Dates
Index Terms
Location
Organization/Arrangement
Provenance
Reference Terms
Restrictions supplemental
Condition Reports supplemental

To run the report:

- You can run this report on one record or a subset of your collection level records. Select a subset of your data, if desired, by activating a tag set, filter, hierarchical range, or selecting multiple records in the List Pane.
- Select the Survey Form report in the Re:discovery Reports window.
- Choose either Run for Current Record Only or Run for All Visible Records if you have a subset selected.

11. *How do I print the Series Totals report?*

The Series Totals report is only available on the Series level. It provides a sum of the Extent and Count subfields within the Extent field on the Series level. Use this report when you need to total the Extent and/or Count fields on a group of records.

To run the report:

- Select a subset of your data, if desired, by activating a tag set, filter, hierarchical range, or selecting multiple records in the List Pane. If you don't select a subset, the report will total all records visible in the List Pane.
- Select the Series Totals report in the Re:discovery Reports window.
- Run the report on All Visible records.

The report includes the totals for Extent and Count as well as the number of records.

12. *How do I print the File Unit Totals report?*

The File Unit Totals report is only available on the File Unit level. It provides a sum of the Extent and Count subfields within the Extent field on the File Unit level. Use this report when you need to total the Extent and/or Count fields on a group of records.

To run the report:

- Select a subset of your data, if desired, by activating a tag set, filter, hierarchical range, or selecting multiple records in the List Pane. If you don't select a subset, the report will total all records visible in the List Pane.
- Select the File Unit Totals report in the Re:discovery Reports window.
- Run the report on All Visible records.

The report includes the totals for Extent and Count as well as the number of records.

13. *How do I print the Foldlist report?*

The Foldlist report is only available on the Item level. This report prints the supplemental information from the Container List supplemental on the Item record.

To run the report:

- Select Foldlist in the Re:discovery Reports window.
- Run the report for the current record.

14. *How do I print the Item Level Archives Worksheet.doc?*

The Item Level Archives Worksheet.doc is a Word document and is available on the Item level only. It can be printed from the four-level archives directory or the Item Level directory. Use it as a worksheet to fill out item level records to aid in data entry.

When you select this report in the list, click Run for Current Record only. The report will open in Microsoft Word. Print it as you would any other Word document.

15. *How do I print the Item Totals report?*

The Item Totals report is only available on the Item level. It provides a sum of the Extent and Count subfields within the Extent field on the Item level. Use this report when you need to total the Extent and/or Count fields on a group of records.

To run the report:

- Select a subset of your data, if desired, by activating a tag set, filter, hierarchical range, or selecting multiple records in the List Pane. If you don't select a subset, the report will total all records visible in the List Pane.
- Select the Item Totals report in the Re:discovery Reports window.
- Run the report on All Visible records.

The report includes the totals for Extent and Count as well as the number of records.

16. *What other report options are available in the Archives Module?*

There are several other printing options available in the Archives Module that work the same as in other directories.

Print List
Print Preview
Quick Report
Full View

See Chapter 5, Printing and Reports for information on using these printing options.

In addition, you can also print the Hierarchical Browse view. See Section J above.

17. *Do any of the reports print information from across archival levels?*

No. Each report is specific to the archival level from which you access it.

O. Item Level Directory

1. *What is the Item Level archives directory?*

The Item Level archives directory permits cataloging of archival materials at the item level only, without being tied to collection, series, and file unit records within a standard hierarchical format.

2. *When should the item level only directory be used?*

The item level archives directory should **never** be used. It has been included in version 8.10 primarily to accommodate item level descriptions that were entered incorrectly in the past, and which remain in the catalog because they have not yet been fixed.

3. *If I am not allowed to use the Item Level directory, then how should I do item level description?*

Item level description should always be done within the hierarchical structure of the overall collection (i.e., in the four-level archives directory).

4. *What if I have an individual item that is not part of a collection, and I think should be described in the Item Level directory?*

Contact the WASO Museum Management Program or your bureau's collection management contact for guidance on individual items.

5. *How do I access the Item Level archives directory?*

To access the item level archives directory:

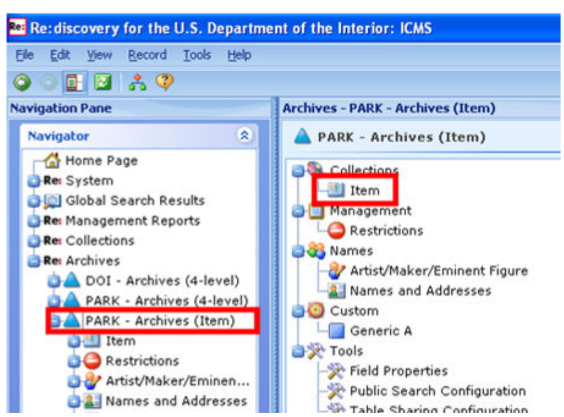
- Expand the Archives module in the Navigation Pane so that you see the available directories, *or*

- From the Home Page, expand the Archives module, if necessary, to see the available directories and double click the Archives (Item Level) directory.

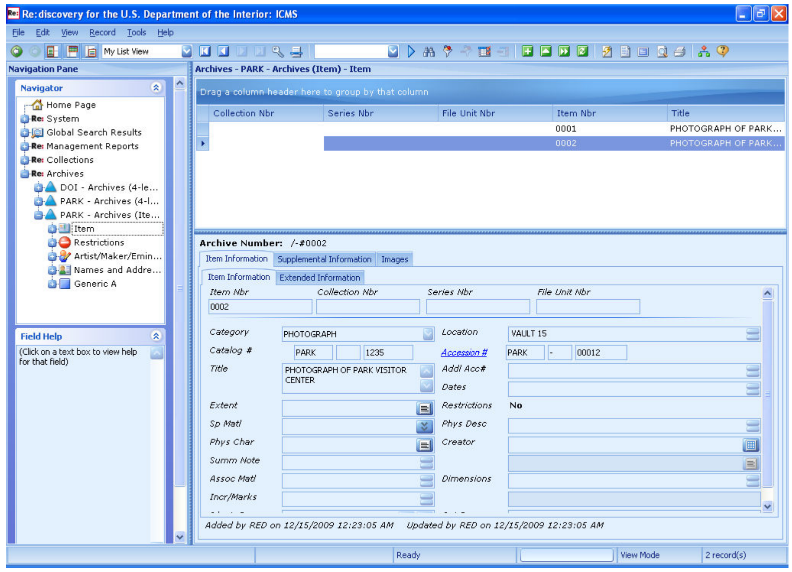
Note: Since the Item Level Archives directory is optional, your system may not have a directory already created. Refer to Section IV of Chapter 9, Tools for information on how to create new directories.

- From the Navigation Pane, expand the Archives (Item Level) directory by clicking the + in front of the directory name and select Item, *or*

- From the Directory page on the right, double click the Item option under Collections.



- The Item Level will open showing any available item records in the List Pane and Record Pane.



6. *What is the difference between the Item Level archives directory and the Item level in the Hierarchical archives directory?*

The Item Level directory has a few differences from the item level in the 4-level archives directory:

- The Item Level directory does not require Collection, Series and File Unit numbers to connect the item records.
- There is no Hierarchical Parents tab for the Item Level directory.
- There is no hierarchical browse in the Item Level directory.
- There is no hierarchical range in the Item Level directory.

7. *How do I add a record in the Item Level directory?*

To add a record to the Item Level directory:

- click the Add button on the button bar, *or*
- select Add New Record from the Edit menu, *or*
- press F9

8. *How do I modify a record in the Item Level Directory?*

To modify a record in the Item Level directory:

- select the record you wish to modify in the List Pane.
- click the Modify button on the button bar, *or*
- select Modify This record, *or*
- press F10

9. *How do I delete a record in the Item Level directory?*

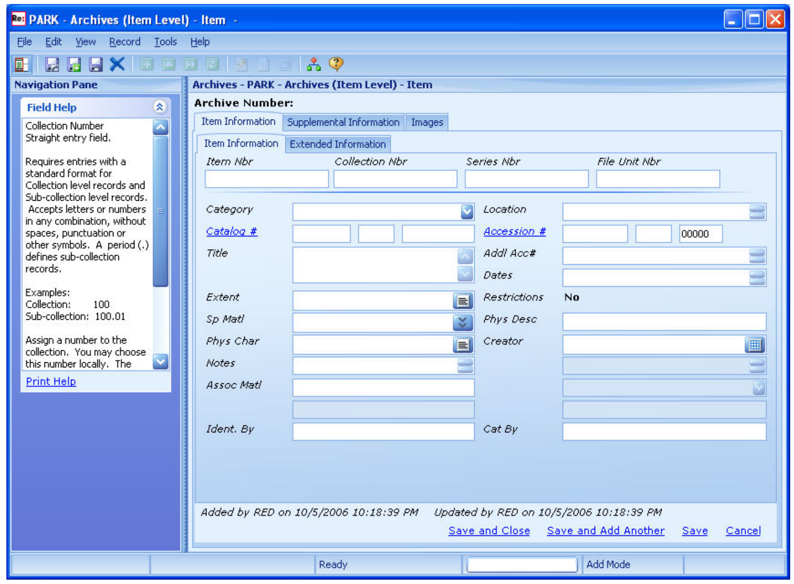
To delete a record in the Item Level directory:

- select the record you wish to delete in the List Pane.
- select Delete This Record from Delete Record(s) on the Edit menu.

10. *How do I complete the fields on the item level record?*

The fields in the item level directory are exactly the same as the fields in the item level of the 4-level archives directory. Follow the instructions in

Section G above for completing the fields for an item record.



Note: The Item number is entered first on the item information screen. The Collection, Series, and File Unit numbers are not required.

11. *Can I transfer Item Level directory records to the item level in the 4-level archives directory?*

Yes. You can transfer the item level directory records to the item level of the 4-level archives directory. Refer to Section I of Chapter 8 for information on how to transfer records between directories.

Note: These item records must be associated with higher level records in the 4-level archives; make sure to enter the correct collection, series and/or file unit numbers before transferring the records.

P. Overview and Introduction to Archival Cataloging

1. *Why is the Archives Module necessary?*

Archival materials cannot be cataloged in the same way that other types of museum objects are cataloged. It was impossible to add all of the various fields necessary for archival description into the Collections Management Module. Unlike the Collections Management Module, the Archives Module meets archival standards and provides an archivally-correct format for recording the information that is necessary to manage archival materials. It also can create both printed and electronic finding aids easily, greatly facilitating research and retrieval of individual documents.

2. *How is archival cataloging different from museum cataloging?*

Museum cataloging typically is done on an object-by-object basis. That is, each object is cataloged individually, with its own catalog number. As a rule, however, archives should not be cataloged on a document-by-document basis. Instead, archives should be cataloged on a collection-by-collection basis. That is, a collection of archival materials, no matter how large it might be, would receive a single catalog number. Then, moving from the Collections Management Module to the Archives Module, the collection would be described in more detail, based on the way in which the collection is organized.

3. *Why is attempting to do archival cataloging on a document-by-document basis not recommended?*

First, there are so many thousands of individual documents in a typical collection, it would be practically impossible to catalog each one of them. Second, even if document-by-document cataloging were possible, it would not be worth the effort. Archives have to be organized and described in groups (collections, series, subseries, file units, etc.) in order to be meaningful and manageable. Having millions of disconnected, individually-cataloged documents in your database would be sheer chaos.

4. *What are the two most important things you have to do before you can attempt archival cataloging?*

First, you have to identify or define the collection you want to catalog. Second, you have to discern (and perhaps re-establish) the hierarchical organization of the collection. Neither is as difficult or mysterious as you may think.

5. *What is a collection?*

Archives are based on the principle of "provenance" – which means that all the archival materials created by a specific person, agency, organization, or corporation should remain together, and that those archival materials should never be mixed with archival materials created by another person, agency, organization, or corporation.

Thus, a true archival collection consists of all of the historically significant letters, reports, photos, sound recordings, ledgers, maps, motion pictures, research notes, or other types of records compiled by a single person, agency, organization, or corporation, and nothing else.

Such a collection sometimes is called a "natural" or "organic" collection, because it was compiled by a records creator in the ordinary course of doing business, and it reflects what that records creator actually did.

This is the type of collection that you are most likely to encounter. Remember, it is critical to make sure that the collection includes all of the records in your custody that were created by a specific person, agency, organization, or corporation, and that it excludes records created by anybody or anything else.

6. *Does this mean that if Person A wrote a letter, that letter belongs in Person A's collection, and if Person B wrote a letter, that letter belongs in Person B's collection?*

No, not necessarily. A collection contains everything a person, organization, agency, or corporation made ***or received*** in the course of doing business.

For example, suppose Person A writes a letter to Person B. Person A sends the signed original to Person B, but saves a carbon copy of that letter for his or her own files. In such a situation, the carbon copy of the letter that Person A wrote would be part of Person A's collection, and the original copy of that letter that Person A sent to Person B would be part of Person B's collection.

The issue is not so much authorship as who actually retained the records. You probably keep copies of the letters you send, just as you probably keep the letters you receive. Both your incoming letters and the copies of your outgoing letters would be part of your own records collection.

7. *What is an "assembled" collection?*

The sorts of collections described above are "organic" because they were created naturally by a person, organization, agency, or corporation in the course of doing business. An "assembled" collection is artificial, because it was put together after the fact by somebody else, without regard for provenance.

For example, an assembled collection might consist of documents on a specific topic that a collector or curator purchased or otherwise acquired from many different sources. These documents originally were written or received by various entities, and saved in multiple collections, only to be cherry-picked from those collections to create an assembled collection.

Assembled collections lack context and lack archival integrity. They do exist, however, and the **ICMS** Archives Module can accommodate them as easily as a true archival collection.

8. *Once I have identified the collection I am going to catalog, what is the next step?*

You have to figure out how the collection is organized. All collections have some kind of a logical, hierarchical structure. The trick is to figure it out, which, again, is not as difficult or as mysterious as you might think. You will find that it is pretty much just common sense.

9. *What is a hierarchy?*

Hierarchy refers to how an archival collection is structured. An archival collection is not a jumbled mass of randomly filed documents.

10. *What are the standard levels of an archival hierarchy?*

In descending order:

- Collection Level
- Series Level (plus subseries and sub-subseries levels, if necessary)
- File Unit Level
- Item Level

Note: Theoretically, there can be another level that is higher than the collection level. It is called the Record Group Level. Basically, a Record Group is a collection of collections. Ordinarily, Record Groups are only used in very large archival repositories that deal with enormous volumes of archival materials. Some units have used Record Groups, and the **ICMS** Archives Module can accommodate entries at the Record Group Level, but it is unnecessary and inappropriate for most units to consider imposing a Record Group format. The **ICMS** Archives Module will also accommodate a "Sub-Collection Level" – which is an intermediate level between a collection and a series.

11. *What is a Series?*

Ideally, there should be some kind of logical organization to any archival collection. A collection might be broken out into smaller, subordinate components, called “series,” reflecting differences in document type, function, subject, filing scheme, or time period. For example, a collection might be organized into a series of correspondence, a series of financial reports, a series of maps, and a series of diaries.

12. *What is a Subseries?*

These various series might be further subdivided into subseries. For example, the correspondence series might be broken out into a subseries of alphabetically arranged incoming letters, and a subseries of chronologically arranged incoming letters.

13. *What is a File Unit?*

The file unit is the second-lowest level of archival arrangement, immediately above individual items or documents. File units contain all of the documents that the records creator filed together under a particular heading, classification or topic.

Oliver Wendell Holmes (the archivist, not the judge), in his article "Archival Arrangement -- Five Different Operations at Five Different Levels," defined file units as " . . . assemblages of documents relating to some transaction, person, case, or subject . . . ."

Note: 'File units' are not to be confused with 'file folders,' which are merely physical containers for holding documents. A single file unit, in fact, may be so large that it requires multiple file folders. Most series or subseries are groupings of file units. For example, a series entitled "Correspondence" might include individual file units for each person or organization with which the records creator exchanged letters, arranged alphabetically by name of correspondent.

14. *What is an Item?*

Finally, each file unit contains individual documents, or “items.” The file unit for the letter A in the subseries of incoming letters would contain all of the letters received from people whose last names start with “A.”

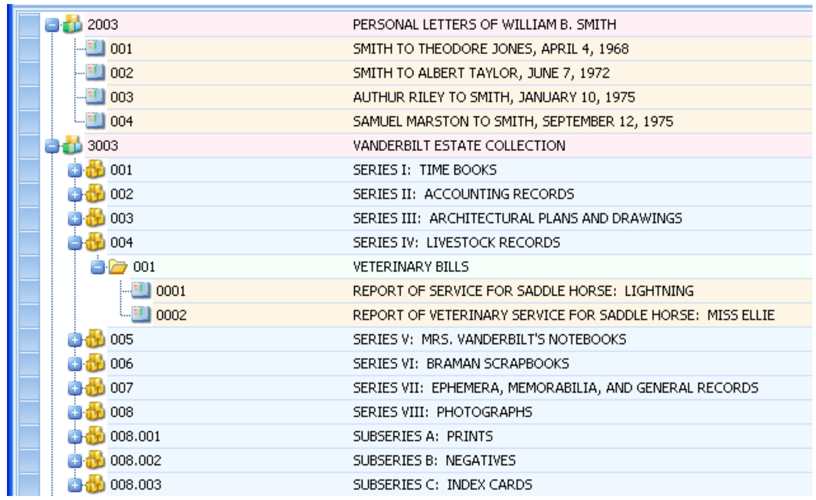
Items refer to documents, not necessarily individual pages. Each document would be a single Item, regardless of how many pages it might include. A one-page telegram would be one Item; a two-page letter would be one Item; and a fifty-page report would be one Item.

Thus, a collection is arranged in a hierarchical fashion, moving from top down, from the general to the specific. Individual documents, therefore, do not stand on their own – like a non-archival museum object. Instead, each document is part of something larger. A letter is part of a file unit; the file unit is part of a subseries; the subseries is part of a series; and the series is part of a collection.

15. *Does this mean that each collection should be organized according to a standard template?*

NO. The job of the archivist is not to force a collection into a standard template. Each collection is unique. The job of the archivist is to identify and preserve each collection’s original order. The concept of hierarchical levels can help an archivist evaluate a collection and figure out its original order, but it would seldom be used as the basis for imposing a new order.

Some collections can have fairly complex hierarchies, with lots of series, and with several of the series broken out into subseries and even sub-subseries. Other collections can have the most simple of hierarchies: just individual documents, arranged in a consistent order, but not part of file units or series. It all depends upon the collection.



16. *Is there some real world, common sense analogy that can help me remember the concept of archival hierarchies?*

Think of a collection as a multi-volume publication. Each volume would be analogous to a series. Within each volume, each chapter would be analogous to a file unit. Within each chapter, individual pages would be analogous to individual documents (or “items”).

If this doesn’t help, you may want to consider hiring an archives contractor to process your collections.

17. *Why do I need to identify the hierarchy before I can catalog an archival collection?*

Full cataloging of an archival collection consists of describing its various hierarchical levels. There is a screen that needs to be completed at the collection level, screens for each of the series, screens for each of the subseries, etc. Obviously, you can’t describe the various series and other elements of a collection’s hierarchy until you know what they are.

18. *What is the recommended, step-by-step process for cataloging an archival collection?*

1\. Enter a brief description of the collection as a whole into the Collections Management Module. This is the only catalog record for the collection that you should enter into the Collections Management Module (although you will be able to take credit in your CMR for 1600 objects per linear foot, regardless of the number of catalog records you enter).

2\. Copy your entry in the Collections Management Module over to the Collection Level screen of the Archives Module.

3\. Enter descriptions of each series in the collection, using as many Series Level screens as necessary (each series gets its own screen).

4\. Enter descriptions of each subseries (or sub-subseries), if there are any. Again, each subseries gets its own screen.

Ordinarily, it is okay to stop here. Most collections need to be described only at the collection and series/subseries levels. Going beyond that usually involves a lot of work and little gain.

5\. If you absolutely, positively have to do it, enter descriptions for each file unit in the File Unit Level – again, each file unit would have its own screen.

6\. If you absolutely, positively have to do it, enter descriptions for each document in the Item Level, in the same fashion as you entered descriptions for the series, subseries, file units, etc.

19. *Must I enter information from the top down?*

Yes. Because the system is hierarchical, you have to enter information hierarchically – that is, you enter the Collection Level description first, the Series Level descriptions second, and so forth. Your entries will be numbered so that all entries from the Collection Level down to the Item Level are linked. You have to do the Collection Level first because it will be the parent screen for all of the Series Level descriptions. You have to do your Series Level descriptions before you do subseries descriptions, because the Series Level screens are the parents for the Subseries Level screens. This same principle applies as you move down the hierarchy to the File Unit and Item Levels.

20. *How do I do a Collection Level description?*

Apart from completing such basic fields on the Collection Level screen as title, years, catalog number, collection number, extent (i.e., volume), restrictions, etc., you need to focus on three critically important fields:

- **Organization/Arrangement:** List the series that make up the collection. If is only a small collection consisting of file units that are not organized into series, then you should indicate whether the file units are arranged alphabetically, numerically, chronologically, or according to some other filing scheme.

- **Scope:** First, list examples of the types of documents that appear most frequently in the collection (correspondence, reports, maps, blueprints, photographs, newspaper clippings, sound recordings, etc.). Second, provide a one paragraph overview of the collection, citing the sorts of activities that are documented and examples of specific topics and highlights.

- **History:** Provide a one or two paragraph history of the organization that created the records, or biography of the person that created the records. (For example, provide a brief biography of Thomas Edison for a collection of Thomas Edison's personal papers, and a brief corporate history of the Thomas Edison Company for a collection of the company's records).

21. *How do I do a Series Level description?*

You follow the same basic procedure used for writing a Collection Level description, treating each series as if it were a mini-collection (with some slight variations). In addition to the basic fields for title, years, series number, etc, the following fields are important:

- **Organization/Arrangement:** List the subseries that make up the series. If the series consists of file units that are not organized into subseries, then you should indicate whether the file units are arranged alphabetically, numerically, chronologically, or according to some other filing scheme.

- **Scope:** First, list examples of the types of documents that appear most frequently in the series (correspondence, reports, maps, blueprints, photographs, newspaper clippings, sound recordings, etc.). Second, provide a one paragraph overview of the series, citing the sorts of activities that are documented and examples of specific topics and highlights.

- **History:** You only need to complete the history field in the Series Level screen under certain circumstances.

- **DO** provide historical information if series are based on specific functional units or events. For example, if the records of a corporation are broken out by series for the various divisions of that company (such as a series for the Research Division, a series for the Manufacturing Division, etc.), then it is appropriate to provide a one or two paragraph history of that division. Or, if the personal papers of an individual contain series based on specific events or eras in that individual's life (such as a series of papers on the person's military service, or that person's exploration of the South Pole), then it is appropriate to provide a paragraph detailing those phases of that person's life.

- **DO NOT** provide historical information if the series are based simply on the types of documents (a series of correspondence, a series of reports, a series of photographs, etc.).

22. *How do I do a Subseries Level description?*

For the Subseries, Sub-Subseries, and Sub-Sub-Subseries Levels, follow the same procedures as for the Series Level.

23. *How do I do a File Unit Level description?*

Apart from the basic fields (title of file unit, file unit number, etc.), all that is needed is a one or two line overview of the content of the documents contained in the file unit.

24. *How do I do an Item Level description?*

Apart from the basic fields (title of document, item number, etc.), all that is needed is a one or two line overview of the document's content, such as list of subjects covered in the document.

25. *How is Item Level description in the Four-Level Archives directory different from Item Level description in the Item Level Only Archives directory?*

Item Level entries in the Four-Level Archives directory are linked to the file units, subseries, series, and collections to which they belong. Thus, they reflect the actual physical organization and the provenance of the collection, and they provide context for each document. Not only does this make each item easier to understand, it also makes each item easier to find and retrieve.

Item Level entries in the Item Level Only directory, however, exist in isolation, with no context, no provenance, and no organization. Unless you know exactly what document you are seeking, and exactly what keywords to use, it is very difficult to find and retrieve items that are entered into the Item Level Only directory.

Item Level Only description is bad archival practice. If you have to provide Item Level description, try to do it in the Four-Level Archives directory.